CUSTOMER +®

Revision 5.3.1

ADMINISTRATION SYSTEM MANUAL

INTRODUCTION

The purpose of this document is to provide information relative to the RSI administration system manual. The document will cover areas from establishing users, items and categories to reporting and system settings.

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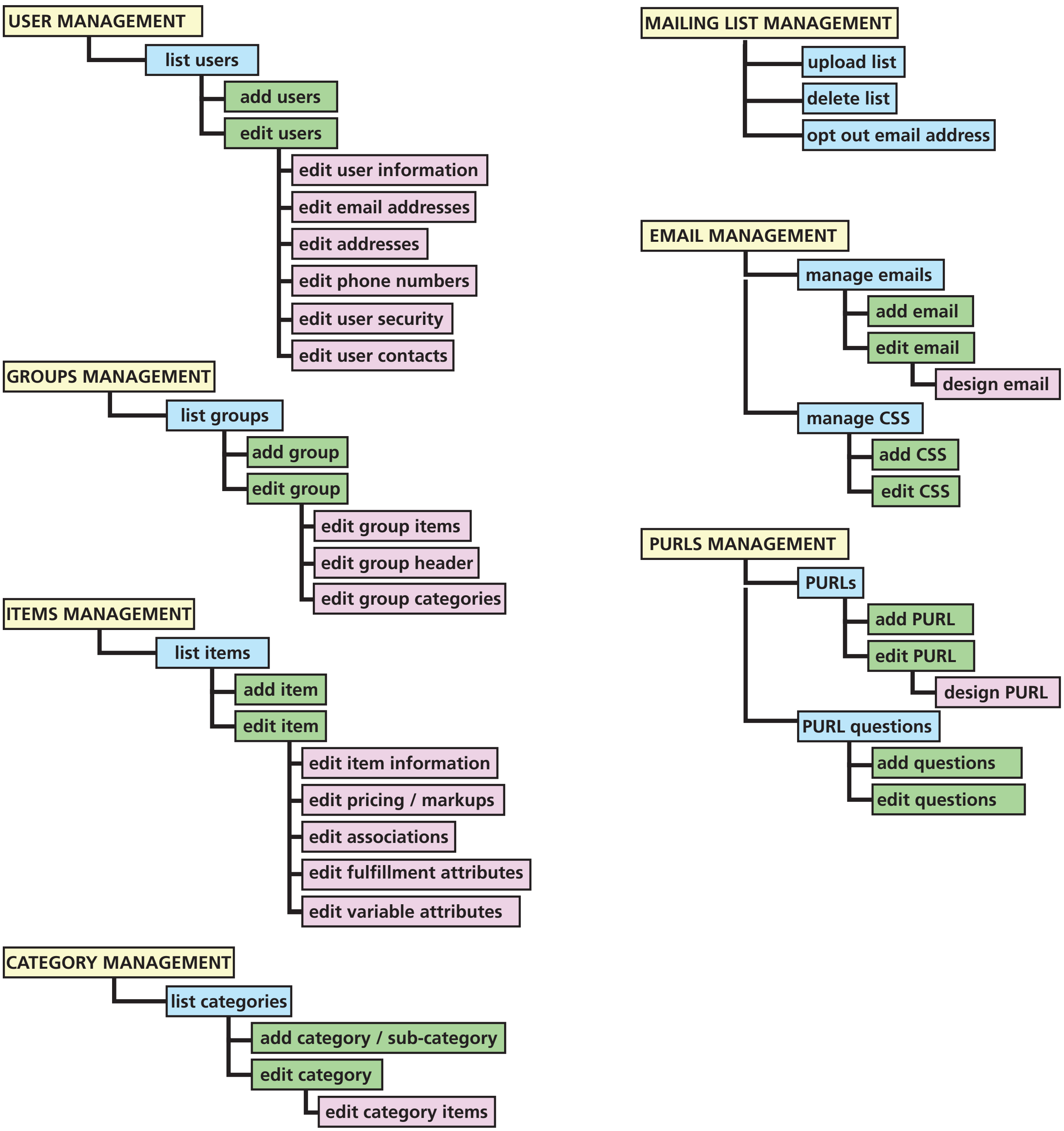
OVERVIEW

ADMINISTRATION SYSTEM AT A GLANCE

The following system flow chart provides an overview of the administration system. Each of the major functions (Item Management, etc.) are shown along with their sub-functions. These areas will be described in more detail, including "screen shots" in the remainder of this document. While the screenshots depict "RSI Lite", the functionality displayed is for the full application.



OVERVIEW, cont.

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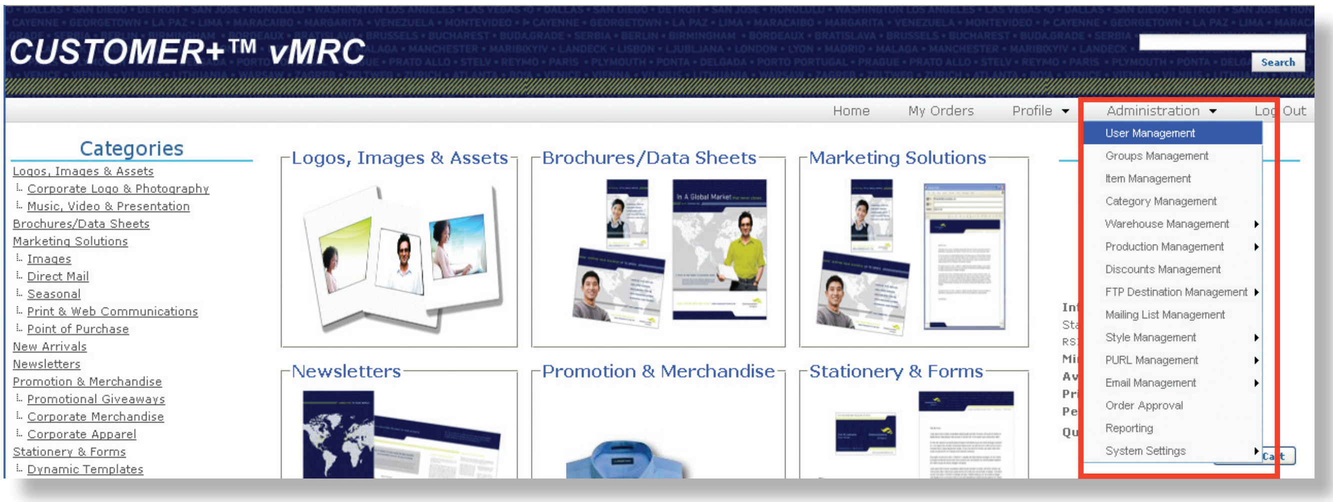
ADMINISTRATION CONCEPTS

ADMINISTRATION PULL DOWN MENU

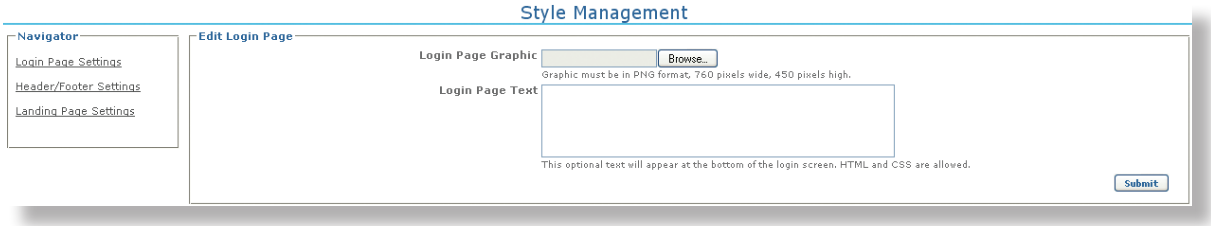
All administration functions are accessible from the Administration tab on the menu bar. This tab can be seen only by the administrators with access levels of 99 or 100.



The remaining sections of this document will describe the various administration functions.

LOGIN PAGE SETTINGS:

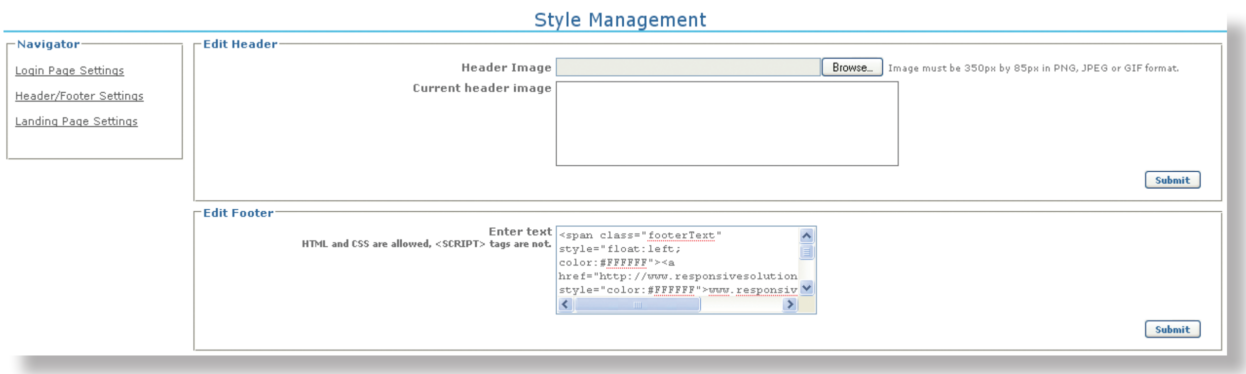
The Login Page Settings control the login page of the site. The main graphic must be in PNG format, 760 pixels wide, 450 pixels high. Images that are not in these dimensions will be expanded or contracted to fit in that space. The Login Page Text is displayed under the user ID and password boxes. Additional styles and HTML can be used to further customize the look and feel of the login page. it is recommended that these modifications only be done by someone with a strong knowledge of HTML and Cascading Style Sheets.



HEADER/FOOTER SETTINGS:

Edit Header - This function allows you to set the default header logo for the site. This image must be 350px by 85px in PNG, JPEG or GIF format. Images that are not in these dimensions will be expanded or contracted to fit in that space.

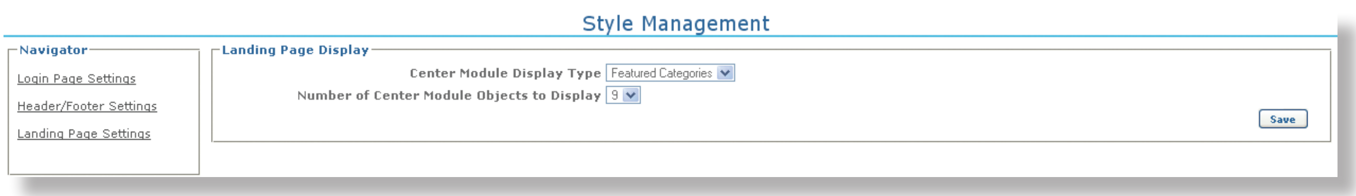
Edit Footer - This function allows you to adjust the footer of the site with customized text. It also allows minor modifications to be made to the site using HTML and CSS. it is recommended that these modifications only be done by someone with a strong knowledge of HTML and Cascading Style Sheets.



LANDING PAGE SETTINGS:

Center Module Display Type - This function allows you to set the default view of the landing page. The landing page shows the categories determined either as "Featured" (indicated in the Category Management) or the Newest.

Number of Center Module Objects to Display - This function determined the display of either 3, 6, or 9 categories on the display page.



USER MANAGEMENT:

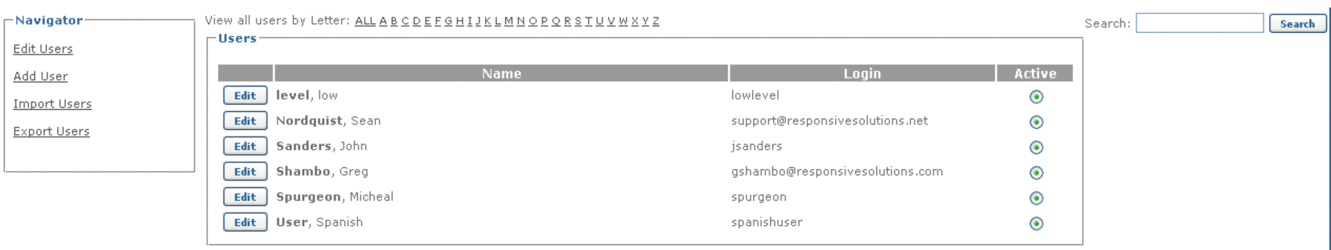
Users are listed alphabetically by last name. By clicking on the letters at the top of the page, users whose first or last name begin with the chosen letter are displayed. A search box is also available for finding a specific user.

From this screen the administrator can add, edit, activate or inactivate users, import a user list, or export the users on this site.

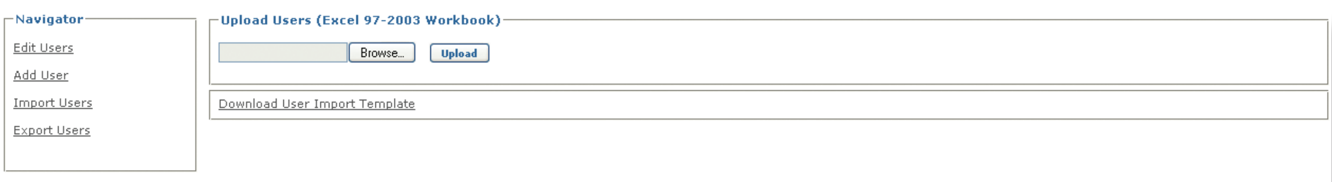
Editing:
Clicking on the **Edit Users** link brings the administrator to the list of all users on the system. Clicking on the **Edit** button allows the administrator to edit the selected user's information.

Adding User:
Clicking on the **Add User** link allows the administrator to add a user to the system.

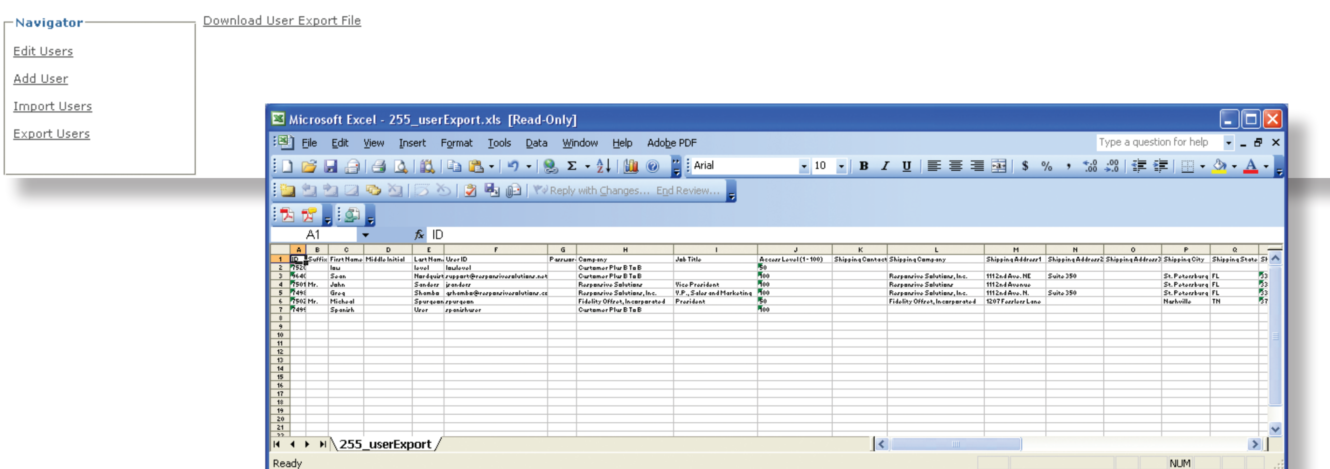
Activating / De-activating users:
Clicking the Active button enables or disables the user in the system. When inactive, this user can no longer login or place any orders, although history for the inactivated user is retained. Remember: a hollow button denotes inactive, a dot represents active.



Import Users:
Clicking on the **Import Users** link allows the administrator to upload a list of users. The file must be in Excel 97-2003 format. A template is availabe for download to create an upload template that will contain all of the available fields.



Export Users:
Clicking on the **Export Users** link allows the administrator to export a spreadsheet of all users on the system. The file will be in Excel 97-2003 format for download.



USER INFORMATION:

The Main User Information Screen allows the administrator to add a new user or edit the primary user information.

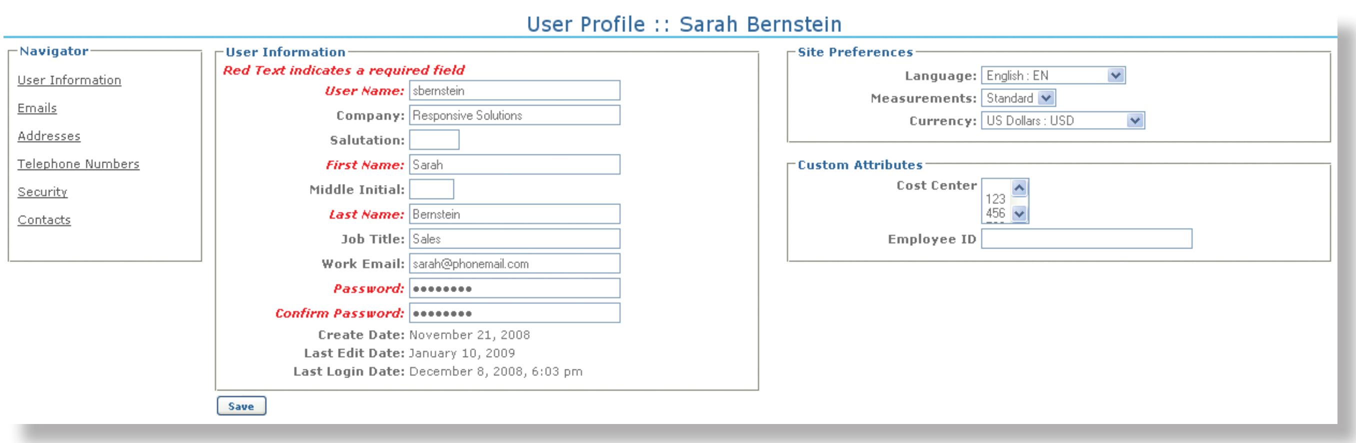
Information that can be added or edited on this screen is as follows:

- **Username** – The user's primary email address, which is used for authentication into the system.
- **Company** – Derived from the company and cannot be changed.
- **Salutation** – Mr., Mrs., Dr. etc.
- **First Name** – User's first name.
- **Middle Initial** – User's middle initial.
- **Last Name** – User's last name.
- **Job Title** – User's job title.
- **Work Email** – User's email address (if not used for the User Name).
- **Password** – User's password.
- **Confirm Password** – Makes sure the entered password does not contain typos.

Also displayed on this screen is the creation date, last edit date, and last login date for the user.

- **Language** – When the Languages feature is active, this determines what language the site will appear in for this user when they log in.
- **Measurements** – Determines if measurements are in U.S. Standard or Metric.
- **Currency** – When the Currency feature is active, this determines what currency the costs will appear in for this user when they log in.

- **Custom Attributes** – If the administrator has assigned custom user attributes, these can be edited for the user.

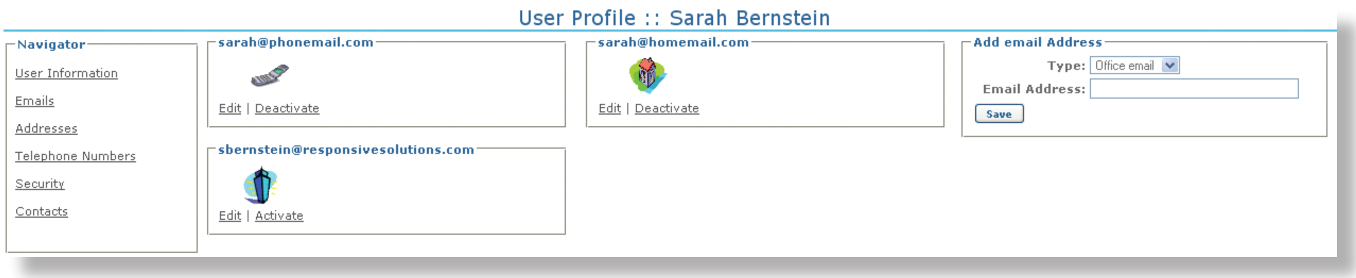


USER EMAIL ADDRESSES:

The Emails screen allows the administrator to add or edit additional emails for a user.

A list of current email addresses is listed, an icon designating the type of email address (Home, Office, Mobile), the Edit button, and an activate / de-activate button.

- To add an email, complete the email address in the form to the right, choose the type of email address (Home, Office, Mobile), and click **Save**.
- To edit an email, click the **Edit** link. This displays the email information into the form to the right, which can then be edited.
- To activate / de-activate an email, click the link below the icon to change it's status.

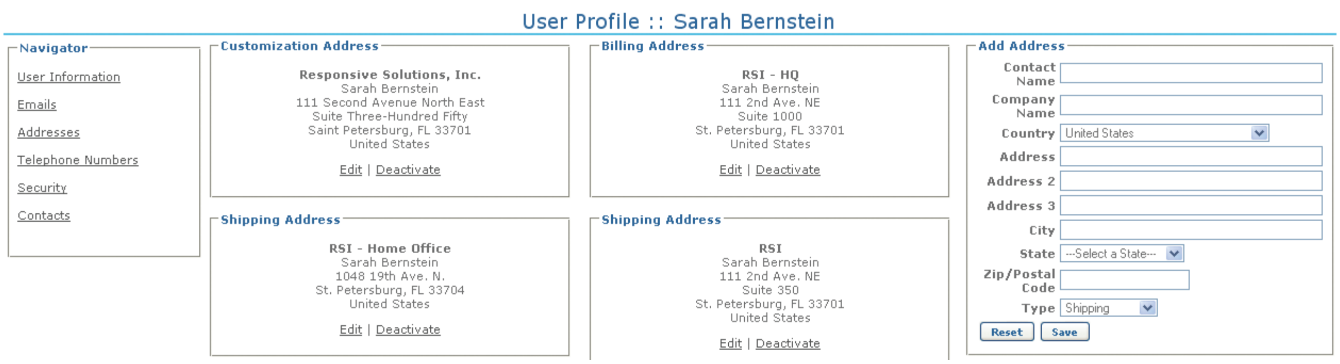


USER ADDRESSES:

The Addresses screen allows the administrator to add or edit addresses for a user.

A list of current addresses is listed with an **Edit** link and a **Deactivate** link.

- To add an address, complete the address fields to the right, and click the **Save** button.
- To edit an address, click the **Edit** link. This displays the address information into the form to the right which can then be edited.
- To deactivate an address, click the **Deactivate** link under the address to deactivate it.
- Addresses can be designated as Shipping (default), Billing (if different than Shipping), and Customization (if using the auto-populate feature of DYNAMIC LAYOUT+ Editor).

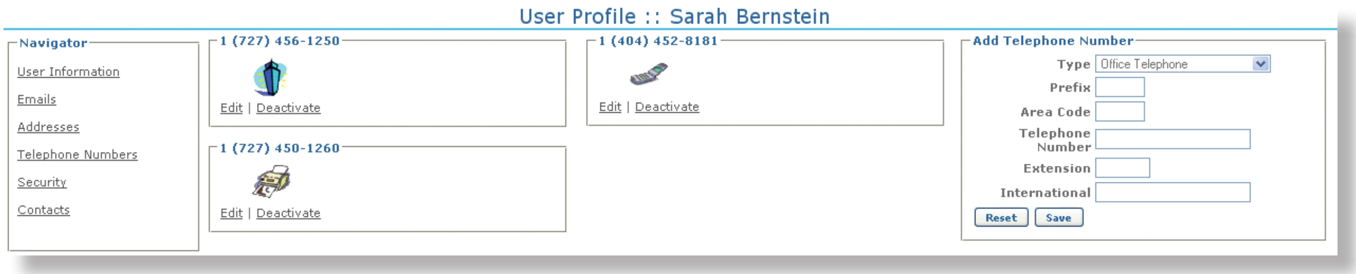


USER PHONE NUMBERS:

The Telephone Numbers screen allows the administrator to add or edit phone numbers for a user.

A list of current phone numbers is listed, an icon designating the type of phone number (Home, Office, Mobile, Fax), the Edit link, and an activate / de-activate link.

- To add a phone number, select the Type, and complete the Prefix, Area Code, Phone Number and Extension, or enter the International telephone number if applicable. Then click the **Save** button.
- To edit a phone number, click the **Edit** link. This displays the phone number information into the form to the right of the phone list which can then be edited.
- To activate / de-activate a phone number, click the link under the number to change its status.

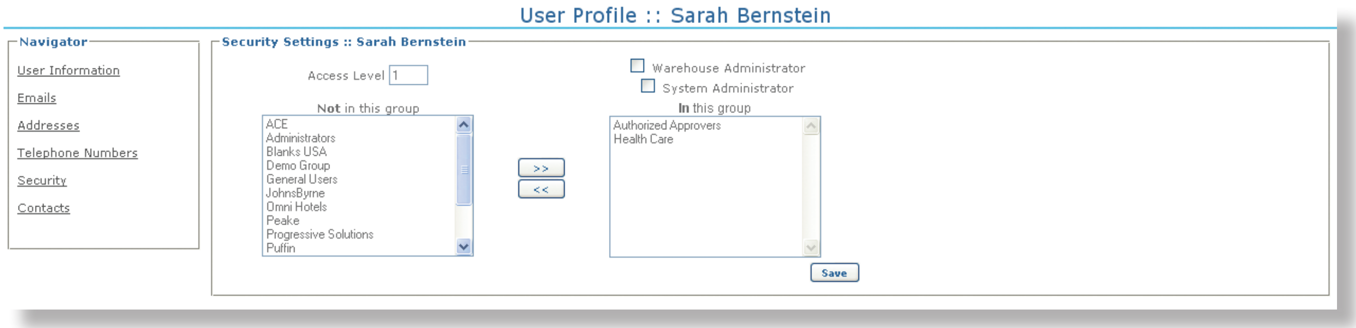


USER SECURITY:

The Security creen allows the administrator to adjust security settings for a user.

The access level of the user can be adjusted at any time by an administrator; a value between 1 and 100 is required for this field. Group select boxes are also displayed. The **NOT in this group** column lists groups that the user does not belong to. The **IN this group** column shows groups that the user belongs to.

- Editing the security level is as simple as entering a number between 1 and 100 into the access level box. **Caution:** setting this to 99 or 100 gives the user administration rights, so use care in adjusting the security settings.
- To add the user to a new group, select the group that is to be added from the **NOT in this group** column, and click the shift to the right button to add the user to the group.
- To remove the user from a group, select the group that is to be removed from the **IN this group** column, and click the shift to the left button to remove the user from the group.
- Adding a user to the Warehouse Admin grants the user complete rights to inventory and order control.
- Adding a user to the System Admin grants the user complete rights to System Admin page, and allows them to make changes to the site. This is NOT recomended for anyone other than the designated System Administrator..
- Click the **Save** button to commit the changes made to the user security settings.



USER CONTACTS:

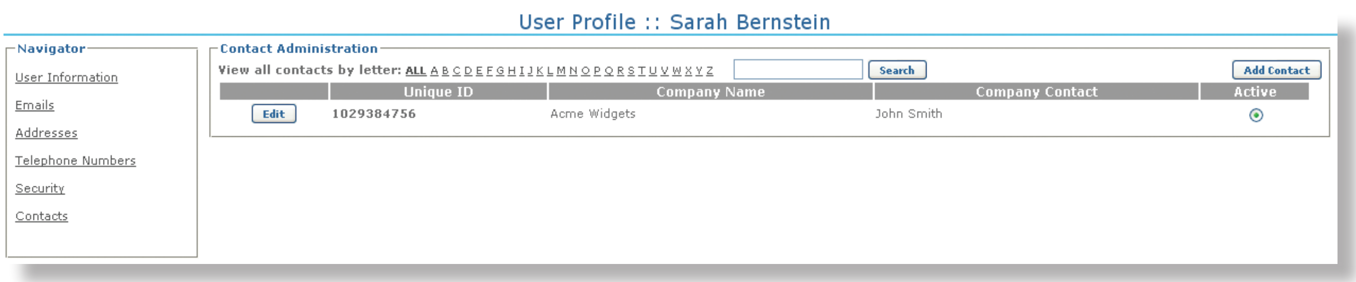
Contacts are listed alphabetically by last name. By clicking on the letters at the top of the page, contacts whose first or last name begin with the chosen letter are displayed. A search box is also available for finding a specific contact.

From this screen the administrator can add, edit, activate, or inactivate contacts.

Adding Contact:
Clicking on the **Add New Contact** button allows the administrator to add a contact to the user's profile.

Editing:
Clicking on the **Edit** button allows the administrator user to edit the selected contact's information.

Activating / De-activating Contacts
Clicking the Active button enables or disables the contact in the user profile. When inactive, this contact will not appear as an option for shipping or on searches, although history for the inactivated user is retained. Remember: a hollow button denotes inactive, a dot represents active.

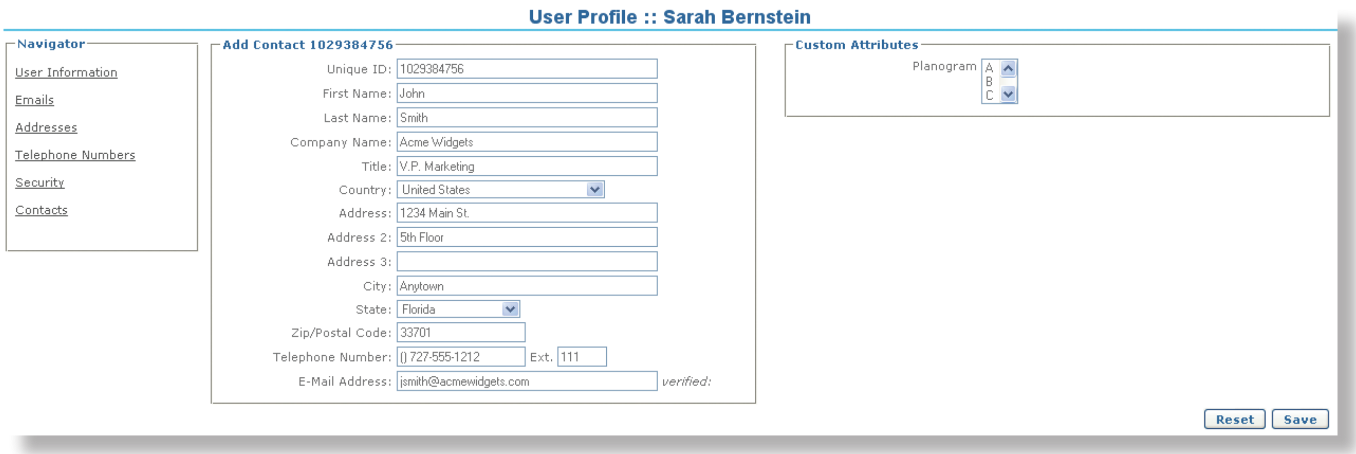


EDIT CONTACTS:

The Edit Contact Screen allows the administrator to edit a contact information.

Information that can be added or edited on this screen is as follows:
- **Unique ID** – A unique identifier for the contact, such as an employee number.
- **Contact Name First Name** – Contact's first name.
- **Contact Name Last Name** – Contact's last name.
- **Company Name** – Contact's company name, if applicable.
- **Title** – Contact's's job title.
- **Country** – Contact's country (this will drive the available postal codes, if any).
- **Address** – Three available fields to allow Suite numbers, departments, etc..
- **City, State, Postal Code** – Contact's city, state, and postal code.
- **Telephone Number and Extention** – Contact's work phone number and extention.
- **Email** – Contact's email address

- **Custom Attributes** – If the administrator has assigned custom contact attributes, these can be edited for the contact.



GROUP EDITING:

There are three kinds of Groups: User Groups, Contact Groups, and Approval Groups.

User Groups are simply sets of users put together to allow access to certain categories and/or items. Groups can be departments, offices, or even different companies.

Contact groups are sets of users with access to certain sets of Contacts used to deliver orders.

Approval Groups are sets of users with controls placed on their ordering abilities, with other users designated as approvers for that group.

Groups are listed alphabetically by name in each section.

From this screen the administrator can add, edit, activate, or inactivate groups.

Editing:
Clicking the Edit Groups link lists all of the existing groups
Clicking on the **Edit** button allows the administrator to edit the selected Group's information.

Adding a Group:
Clicking on the **Add User Group**, **Add Contact Group**, or **Add Approval Group** link allows the administrator to add a group to the system.

Activating / De-activating groups
Clicking the Active button disables the group in the system. Remember: a hollow button denotes in-active, a dot represents active.

Caution: When deactivating a group, remember users who are a part of this group lose the access privileges granted to this group.


Group Administration

Navigator
Edit Groups
Add User Group
Add Contact Group
Add Approval Group

User Groups

	Group Name	Access Level	Active
Edit	ACE	1	●
Edit	Administrators	100	●
Edit	Authorized Approvers	99	●
Edit	Blanks USA	1	●
Edit	Demo Group	1	●
Edit	Health Care	1	●
Edit	NuGraphics	1	○
Edit	Omni Hotels	1	●
Edit	Peake	100	●
Edit	Progressive Solutions	1	●
Edit	Puffin	1	●
Edit	Responsive Solutions Demo	1	●
Edit	Testing	1	●
Edit	Warehouse Managers	99	●

Contact Groups

	Group Name	Access Level	Active
Edit	Retail Group	10	●

Approval Groups

	Group Name	Access Level	Active
Edit	Authorized Approval Users	1	●

EDIT GROUP:

The Edit Group Screen allows the administrator to adjust groups for the system. Adding a group is identical to editing a group, except that the values are blank, and there are no users in the **Users IN this group** column. Both User and Contact Groups function the exact same way.

The group name, description, items and users belonging to the group can be edited. The **Users NOT in this group** column lists users that do not belong to this group. The **Users IN this group** column shows users that are in this group. Check marks next to items determine if they are part of the group, and a link for each item links to the group approval editor for this item.

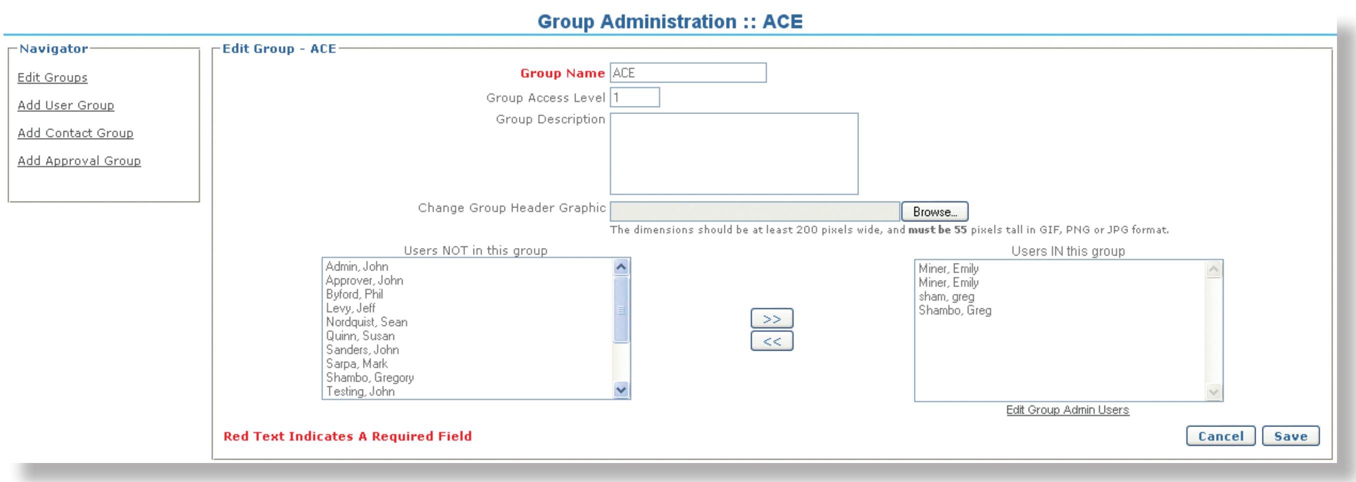
Editing Group Information

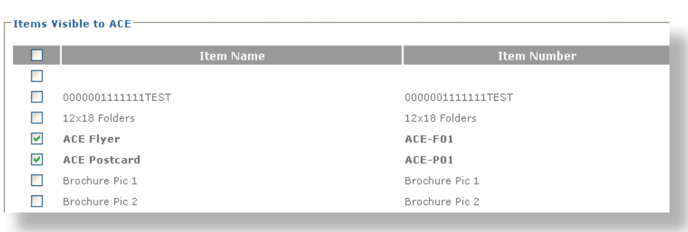
- Groups must be named and be given a Group Access Level. A level of 100 will allow all users in this group to have Administrator access.
- Groups may have their own header graphic at the top of the page. This will not affect the login page or any other users outside of this group.
  NOTE: Users will always see the graphic associated with the HIGHEST level group they are in.
- To add a user to a group, select the user that is to be added from the **Users NOT in this group** column, and click the shift to the right button to add the user to the location.
- To remove the user from a group, select the user that is to be removed from the **Users IN this group** column, and click the shift to the left button to remove the user from the group.
- Click the **Save** button to update the group information.

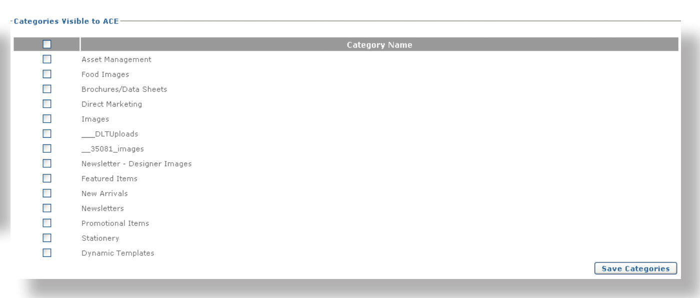
Editing Group Items, Categories, or Contacts

Adding items, categories, warehouses, and contacts to a group is done by clicking the check box next to its name. A **Check All** and **Check None** button help the administrator make blanket edits.

- Mark check marks next to the items or item categories that are to belong to the group.
- Click the **Save Items** or **Save Categories** button to update the group items.







ITEM ADDING AND EDITING:

Items are anything that is ordered from the system. The primary Item types are Static and Variable. Static Items can be inventoried or "Just In Time", which means they are printed as they are ordered. Variable Items are either Variable Template, or Variable Data, where select fields can be modified upon ordering.

As a general rule of thumb, consult this chart when creating new items:

Item Type	Requirement	File Delivery Method
Fulfillment	Must have inventory	No file delivery.
Fulfillment/JIT	Must have an FTP Destination	File delivered will be a single file designated on item info page.
Variable Template	Must have an FTP Destination	Files delivered will be full PDF, imprint PDF, and job ticket rtf.
Variable Template/Fulfillment	Needs inventory AND FTP Destination	Files delivered will be full PDF, imprint PDF, and job ticket rtf.
Variable Data	Must have an FTP Destination	Files delivered will be imposed PDF, and job ticket rtf.

NOTE: Designating an item as Just In Time (JIT) overrides the Variable Template settings, and the file will be delivered as a JIT file.

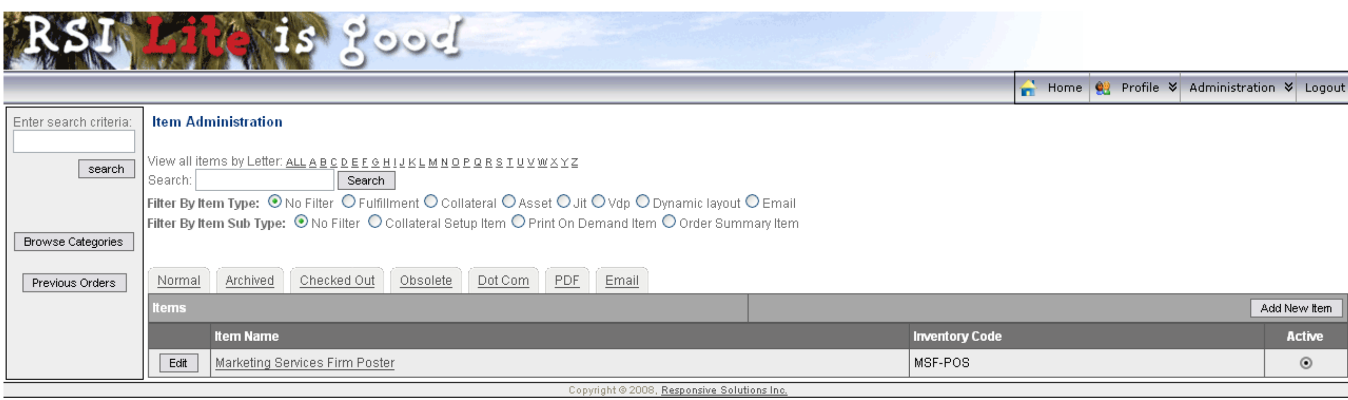
Items are listed alphabetically by name or ascending by SKU, depending on setup.

From this screen the administrator can add, edit, activate, or inactivate items.

Adding an Item:
Clicking on the **Add New Item** button allows the administrator to add an item to the system.

Editing:
Clicking on the **Edit** button allows the administrator to edit the selected Item's information.

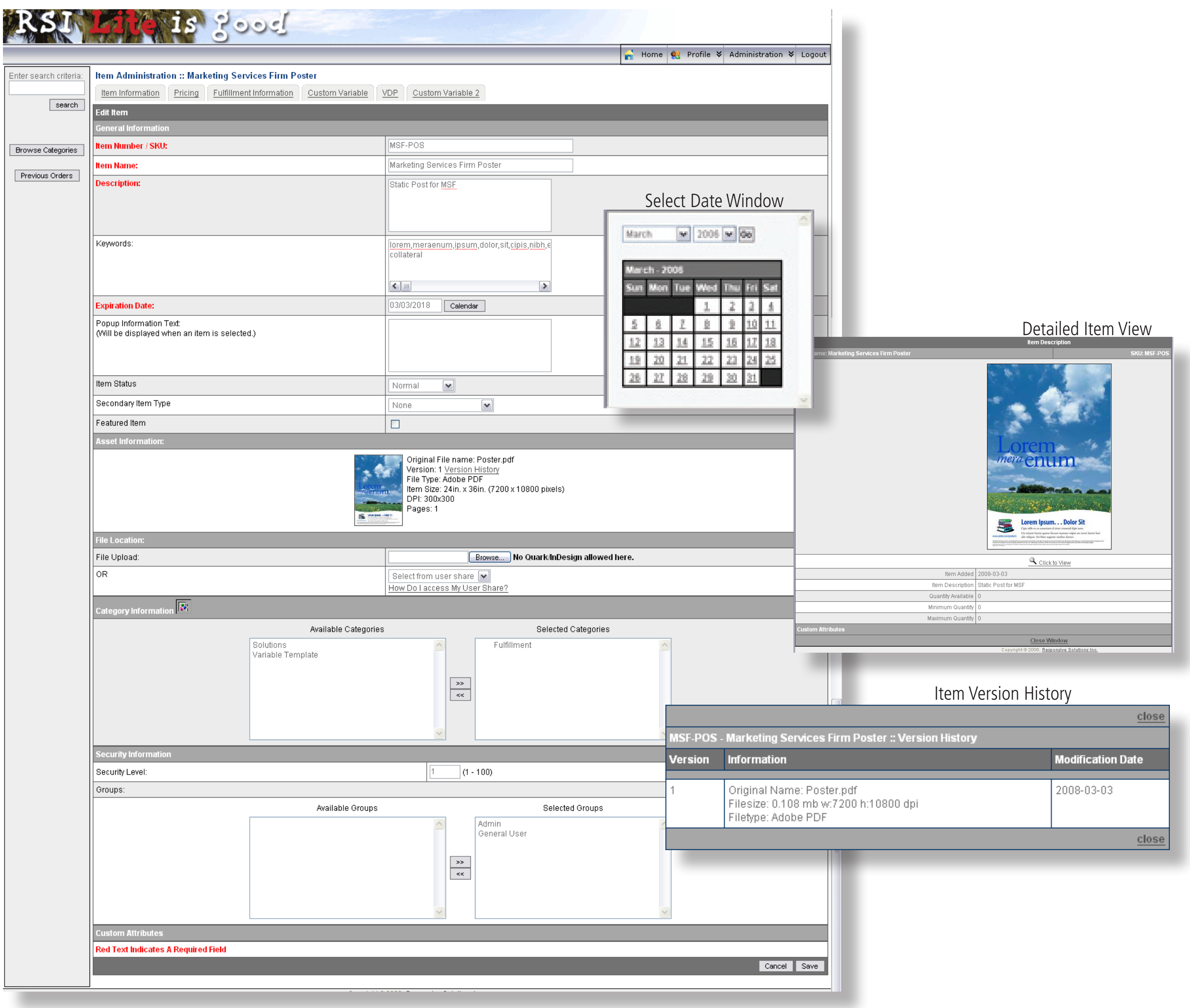
Activating / De-activating items
Clicking the Active button disables the item in the system. Remember: a hollow button denotes in-active, a dot represents active.



ITEM INFORMATION:

The Main Item Information Screen allows the administrator to edit the primary item information.
Information that can be edited on this screen is as follows:

- **Item Number / SKU** – The companies unique identifying code for an item.
- **Item Name** – The item name.
- **Description** – The description of the item.
- **Keywords** – Descriptive words separated by commas that enable users to search for an item. Microsoft Word, PDF and pictures that contain descriptive data are indexed automatically.
- **Expiration** – A preset date in which the item will be deactivated automatically. Clicking on the **Calendar** button launches the **Select date Window**.
- **Item Thumbnail** – Clicking on the thumbnail, displays the **Extended Item View**.
- **Version History** – Clicking on the Version History link displays the change history for an item.
- **File Upload** – New files can be uploaded in two ways: Via the browser or FTP using username and password.
- **Category**– The selected category in which to display the item can also be edited.
- **Group**– The selected group in which to display the item can also be edited.
- **Custom Attributes** – If the administrator has assigned custom item attributes, these can be edited for the item.



ITEM PRICING / MARKUPS:

The Item Pricing Screen allows the administrator to add, edit, or delete pricing and markups for an item.

Displayed on the screen are pricing ranges which can have as many ranges as needed.
Pricing is broken down by: Unit Cost, Imprint Charge, Production Charge, Mailing Charge and Handling Charge. Two additional fields that are customizable are available for the system.

Editing Pricing

- To edit pricing, click the **Edit** button. This populates the information into the form below the pricing list, which can then be edited.
- To delete a price range, click the **Delete** button.
- To add a range, complete the required fields, using only numbers in the pricing fields. Click the **add** button to finish.

Editing Markups / Discounts

Markups and discounts are listed below the pricing matrix. These can only be applied to groups of users.

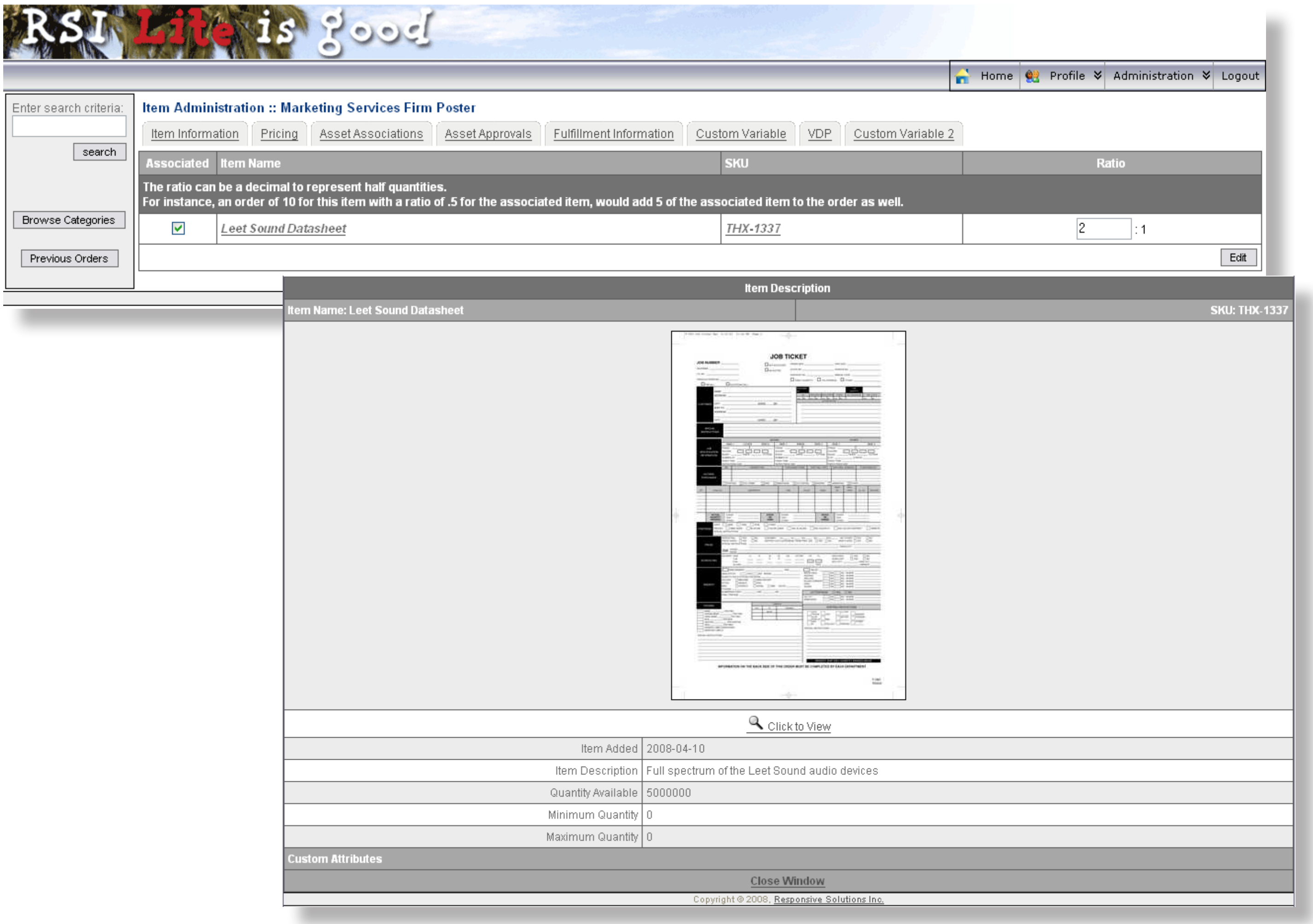
- To add a markup or discount, choose if it will be a percentage or a dollar amount applied the total price. Click the positive or negative radio button to choose if the value will be a markup or discount. To finish, click the **Add** button.
- To delete a markup or discount, click the **Delete** button.

ASSET ASSOCIATIONS:

The Asset Association Screen allows the administrator to group additional items with the current item for ordering purposes. For instance, if the item requires the user to order other items at the same time, this is where the connections are made.

Editing Associated Items

- To add an item to the association, click the check box next to its name. Enter a quantity into the box to the right side of the name. If there is a question as to the item, click on the item name to see the **Extended Item Detail Screen**.
- Once you are done editing associated items, click the **Edit** button.



ITEM FULFILLMENT INFORMATION:

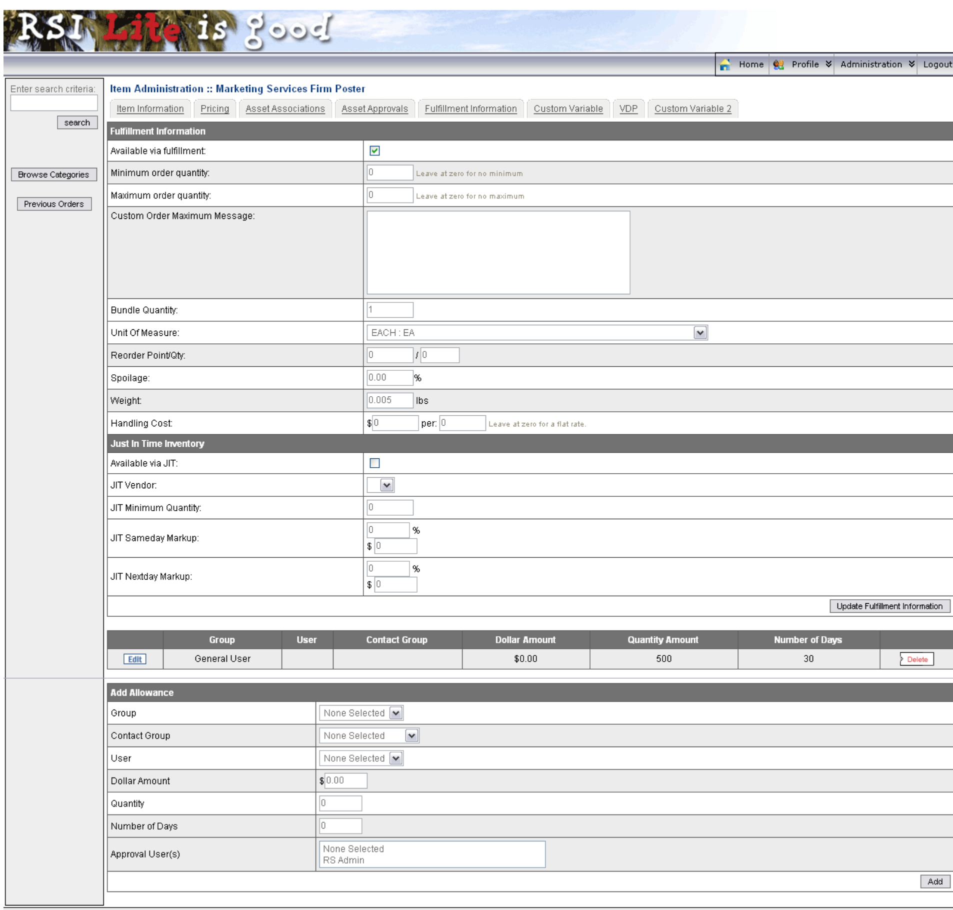
The Item Fulfillment Screen allows the administrator to edit fulfillment for an item.
Displayed on the screen is information pertaining to the fulfillment functions of an item.

- **Available via fulfillment** – Check this box to make this item available for fulfillment.
- **Minimum order quantity** – When used as a fulfillment item, this determines the minimum quantity a user can order. Leave at zero for no maximum
- **Maximum order quantity** – When used as a fulfillment item, this determines the maximum quantity a user can order before the order requires approval. Leave at zero for no maximum
- **Custom Order Maximum Message** – Enter the optional message to be displayed when an order is placed for the maximum set or above.
- **Bundle Quantity** – Enter the increment value if an item should only be able to be ordered in a set increment.
- **Unit Of Measure** – Enter the unit of measure for an item.
- **Reorder Point:** – Enter the minimum quantity for an item before an alert is sent to the administrators.
- **Spoilage** – A percentage of the quantity ordered that will be calculated for aligning presses or finishing.
- **Weight** – Enter the measured weight of a single piece. This is used for shipping calculations at checkout. A common practice is to weigh a standard bundle (50, 100, etc.) and divide by the amount to get the single piece weight.
- **Handling Cost** – Enter the optional value if an item incurrs an additional handling cost.

All changes made to the fulfillment information is submitted by clicking the **Update Fulfillment Information** button.

Just In Time Inventory
Items designated as JIT are not stored in inventory but printed as ordered with the print-ready file being delivered via FTP to the designated location.

- **Available via JIT** – Check this box to make this item Just In Time.
- **JIT Vendor** – Select the FTP designation from this drop down list.
- **JIT Minimum Quantity** – This determines the minimum quantity a user can order. Leave at zero for no maximum
- **JIT Sameday Markup** – Orders designated as Same Day orders can be marked up by percentage or a set dollar value.
- **JIT Nextday Markup** – Orders designated as Next Day orders can be marked up by percentage or a set dollar value.



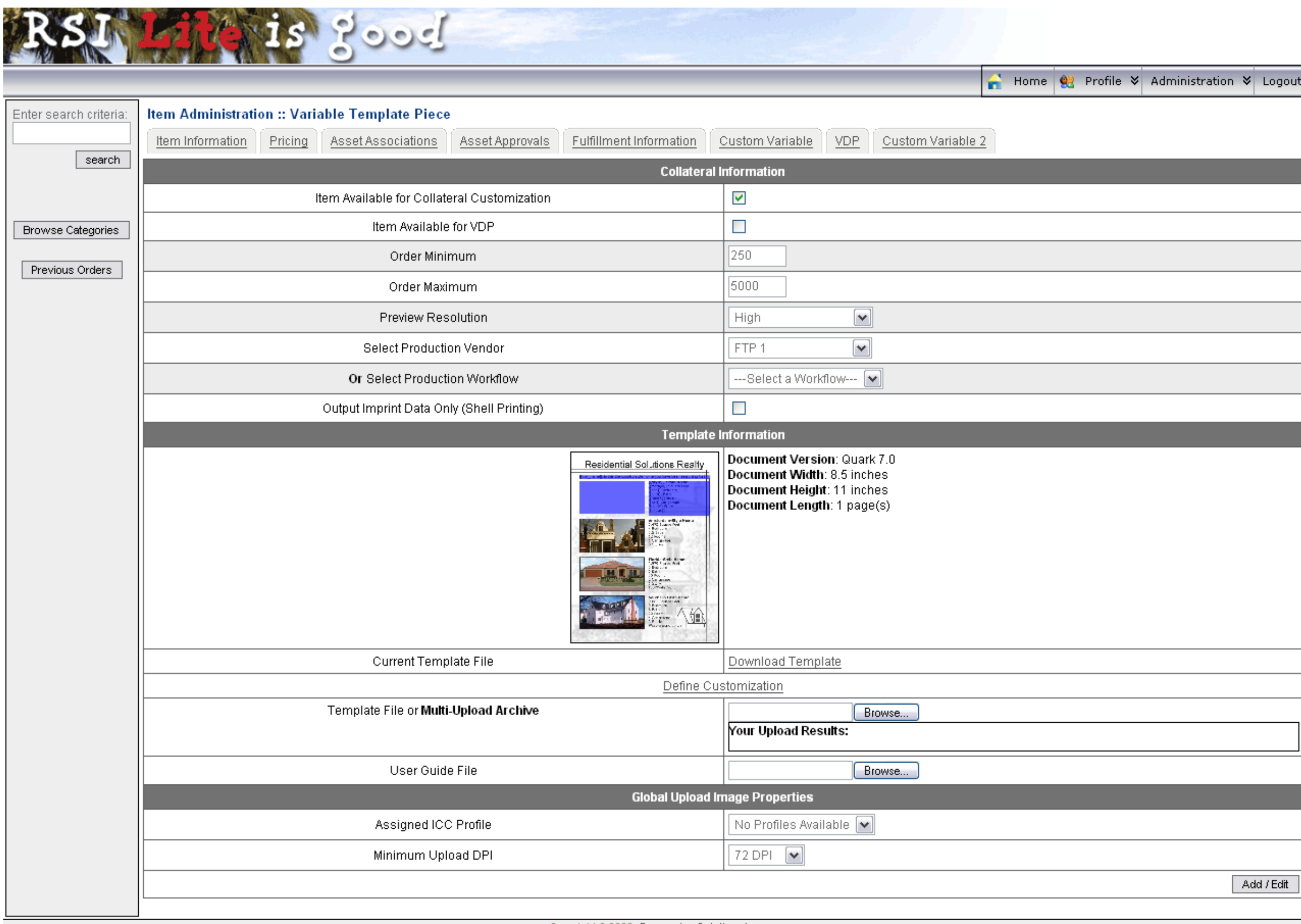
VARIABLE TEMPLATE INFORMATION:

The Variable Template Screen allows the administrator to edit Variable Template aspects for an item.

Displayed on the screen is information pertaining to the Function functions of an item. A more detailed step by step process for designing and implementing a Variable Template piece can be found in Appendix A.

• **Item Available for Collateral Customization** – Check this box to make this item available for Variable Template.
• **Item Available for VDP** – Check this box to make this item available for Variable Data.
• **Order Minimum** – When used as a collateral item, this determines the minimum quantity a user can order. Leave at zero for no maximum
• **Order Maximum** – When used as a collateral item, this determines the maximum quantity a user can order before the order requires approval. Leave at zero for no maximum
• **Preview Resolution:** – Displays the current current resolution for item preview.
• **Select Production Vendor** – Select the FTP Destination for the print-ready file created for this item.
• **Template Information** – Displays a thumbnail and template information.
• **Current Template File:** – Allows the Administrator to download the Quark or InDesign template file..
• **Template File** – To upload a new template file, click the **browse** button and select the new template file for this item.
• **User Guide File** – To upload a new guide file, click the **browse** button and select the new guide file for this item. A User Guide File is used to direct a user on how a template should be completed. Instructions, highlighted fields, and company rules can be included. This file is usually a PDF document.
• **Assigned ICC Profile:** – Displays the current ICC profile for this item.
• **Minimum Upload DPI:** – Sets the minimum DPI for this item.

All changes made to the collateral information is submitted by clicking the **Add/Edit** button.

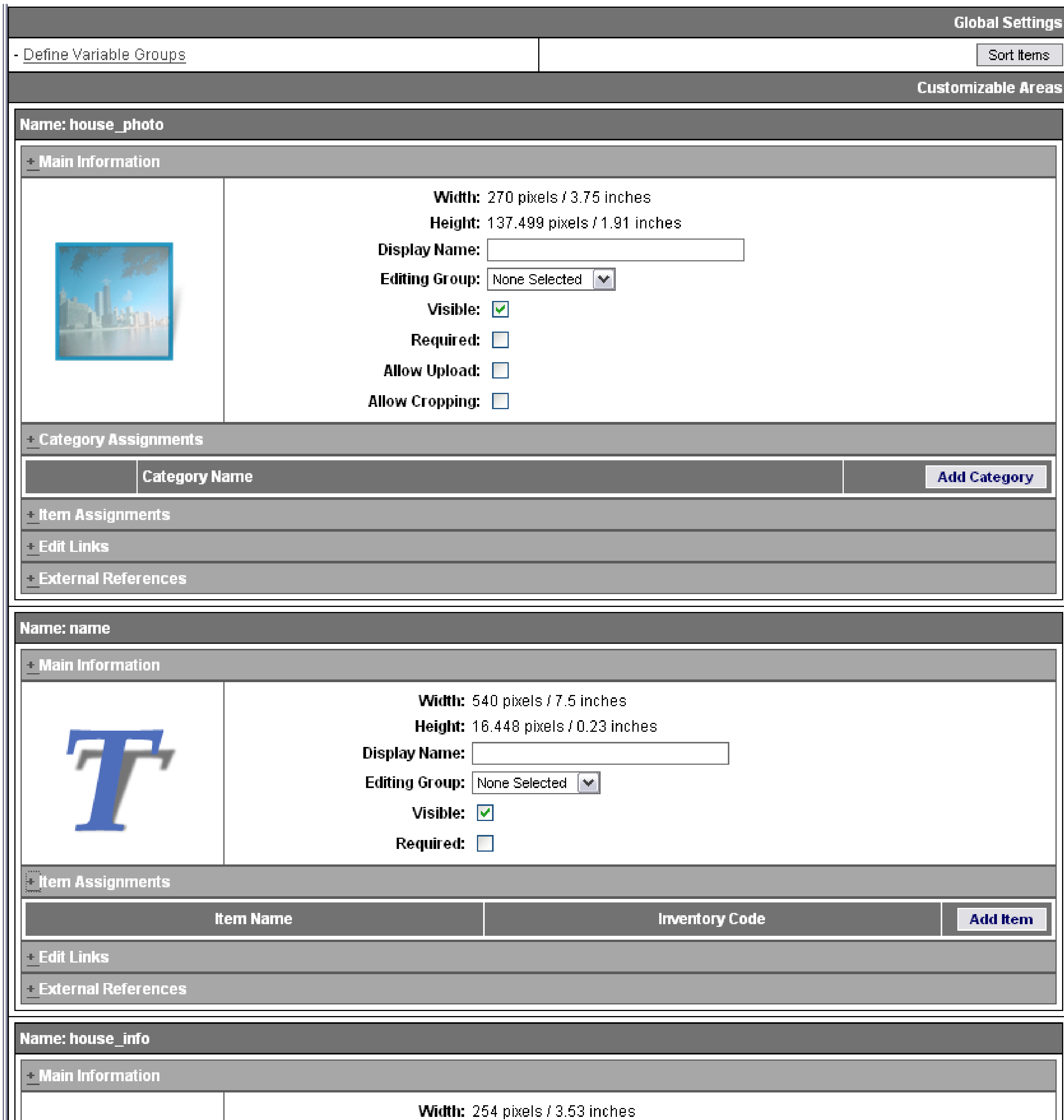


DEFINE CUSTOMIZATION SETTINGS:

The customization screen allows the user to set the variables for the customized piece.

Displayed on the screen are the variable fields pulled from the assigned tagged text file. A more detailed step by step process for designing and implementing a Variable Template piece can be found in Appendix A.

All changes made to the collateral information is submitted by clicking the **Submit Customization** button.



CATEGORY ADMINISTRATION:

Categories are listed alphabetically by name and with subcategories nested underneath.

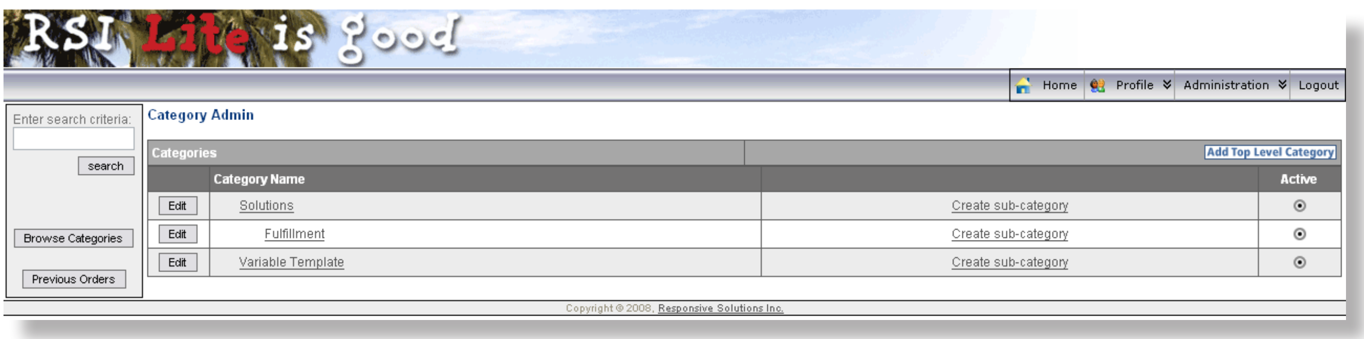
From this screen the administrator can add, edit, activate, or inactivate categories.

Adding a Category:
Clicking on the **Add New Top Level Category** button allows the administrator to add a new top level category to the system. To add a sub category to an existing category, click **create sub-category** next to the category name.

Editing:
Clicking on the **Edit** button allows the administrator to edit the selected Category's information.

Activating / De-activating categories
Clicking the Active button disables the category in the system. Remember: a hollow button denotes in-active, a dot represents active.

Caution: When deactivating a category, remember items that are a part of this category may not be visible to a user in some item views.



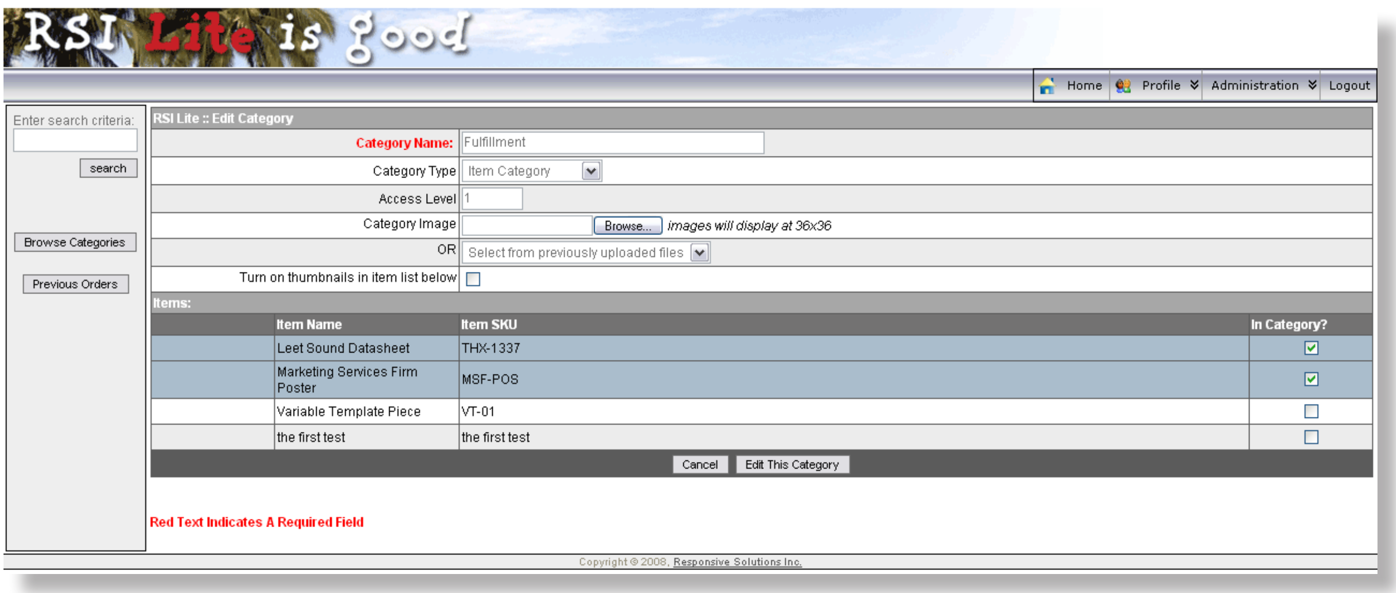
ADD/EDIT CATEGORY:

The Add and Edit Category Screens allows the administrator to create or adjust categories for the system. Adding a category is identical to editing a category, except that the values are blank, and there are no items selected.

The category name, type, access level and items belonging to the category can be edited. Check marks next to items determine if they are part of the category.

Editing Category Information

- Edit the category name, select a category type, and choose a security level.
- Clicking the check boxes next to the item determine if the item is part of this category.
- Click the **Edit This Category** button to update the category information.



WAREHOUSE ADMINISTRATION:

The Warehouse Admin allows the Administrator to manage inventory and orders from a centralized location..

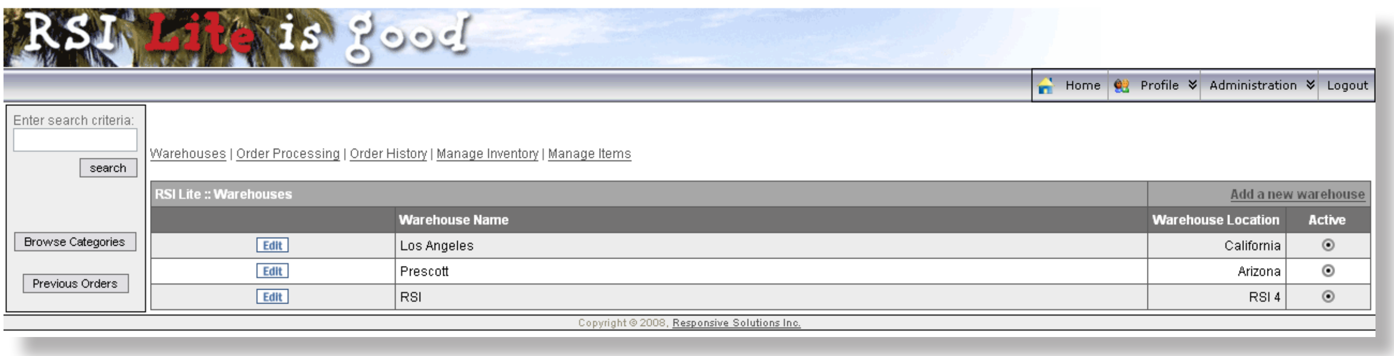
The Main List displays the available warehouse names and locations, as well as allows the administrator to edit them.

Editing A Warehouse

- To modify the existing warehouses, click on the **Edit** button

Activating / De-activating Warehouses

Clicking the Active button disables the warehouse in the system, this warehouse can no longer be used for orders, although history for the deactivated warehouse is retained. Remember: a hollow button denotes in-active, a dot represents active



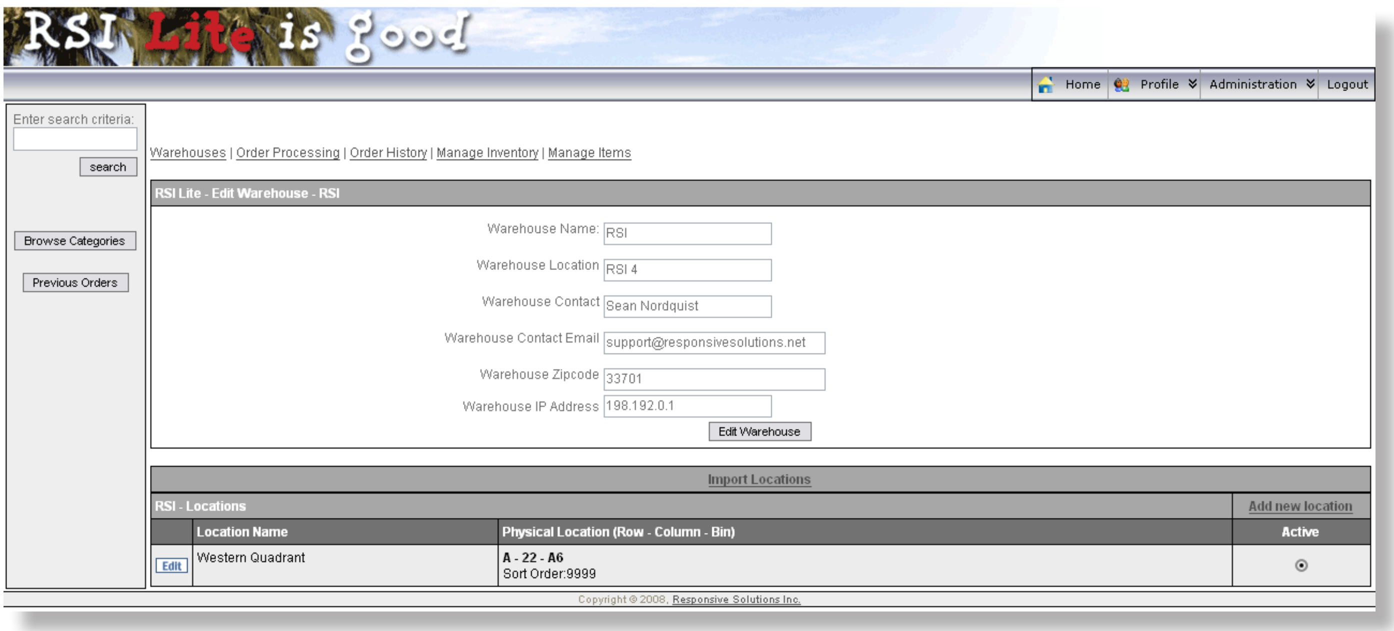
ADD/EDIT WAREHOUSE:

The Add and Edit Warehouse screen allows the Administrator to create or update warehouse for inventory..

Warehouse Settings

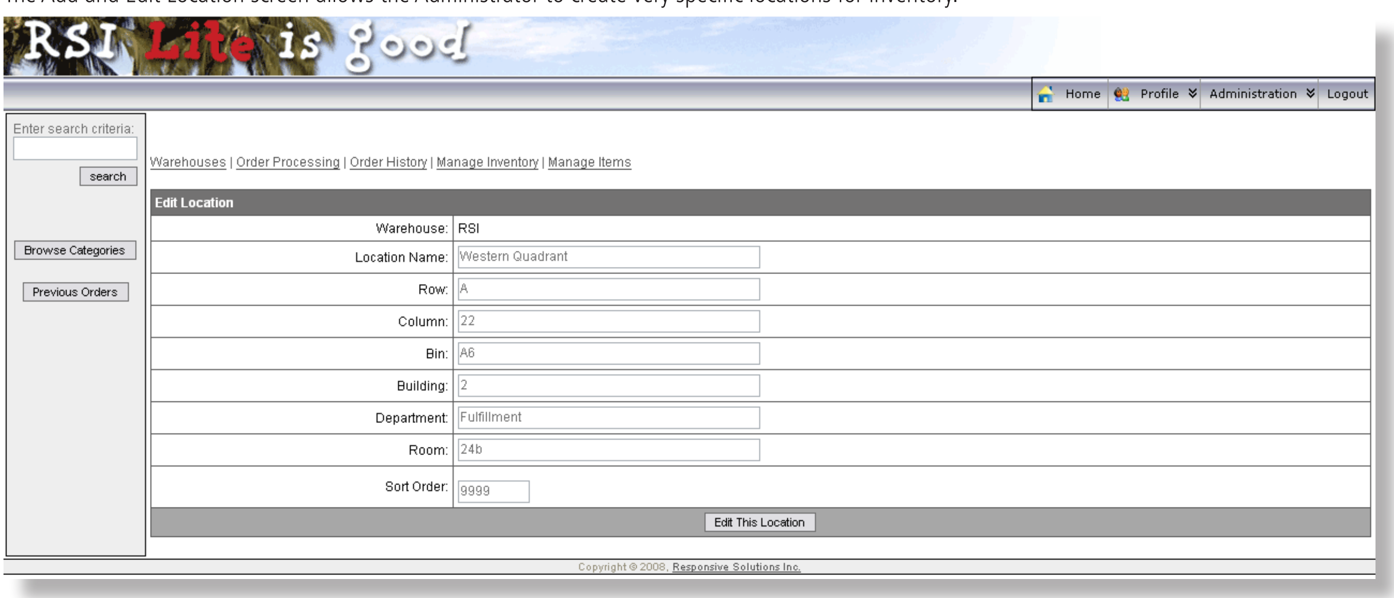
- **Warehouse Name** – The designated name of the warehouse.
- **Warehouse Location** – The physical location of the warehouse.
- **Warehouse Contact** – The individual to be contacted regarding this warehouse.
- **Warehouse Contact Email**– Email address of warehouse contact.
- **Warehouse ZIP Code** – Postal ZIP Code for warehouse. This is required for backend shipping integration..
- **Warehouse IP Address** – IP Address for warehouse system.

Click the **Edit Warehouse** button to modify this warehouse.



ADD/EDIT WAREHOUSE LOCATION:

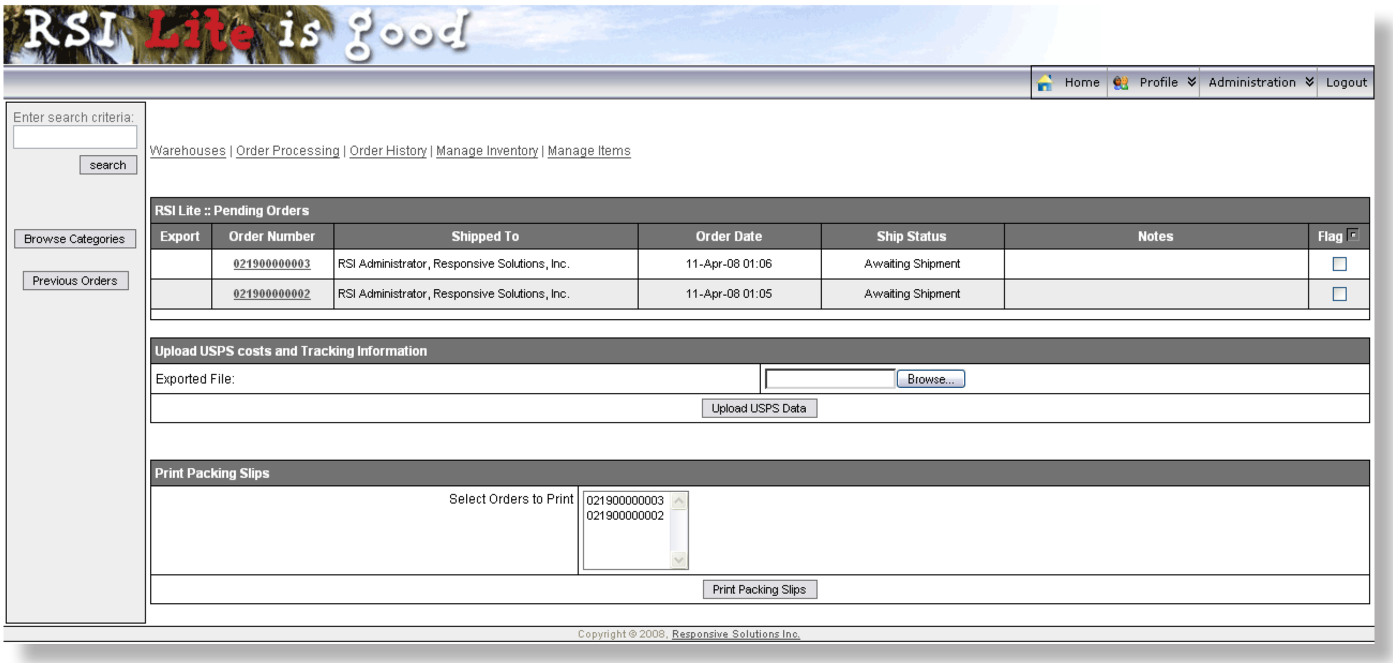
The Add and Edit Location screen allows the Administrator to create very specific locations for inventory.



ORDER PROCESSING:

The Order Processing Screen allows the administrator to view at a glance all open orders that have not yet been shipped. Order numbers, shipping recipients, order date, shipping status, and any shipping notes are displayed. From this page, the Administrator can click on an order number to view the details, or multiple order numbers can be selected and the packing slips for all can be printed at once.

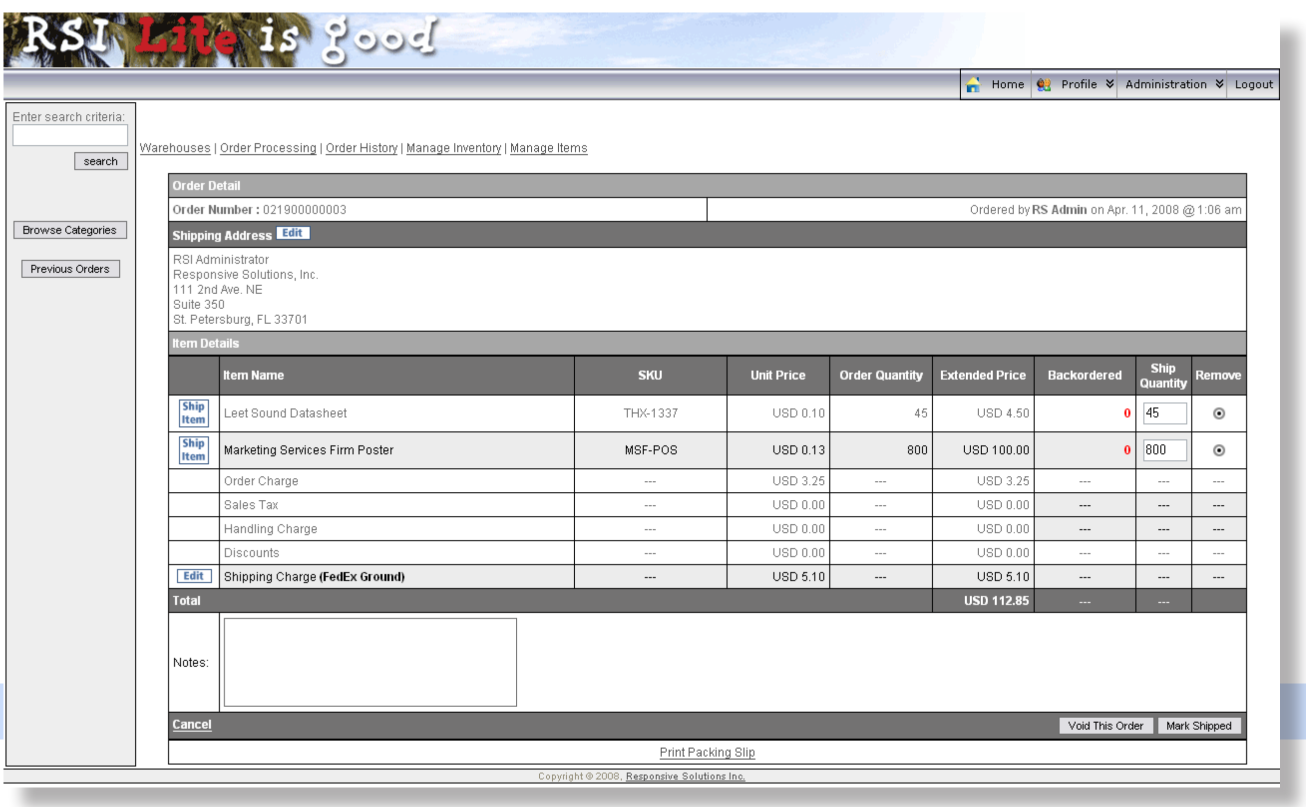
If a third party U.S. Postal Service software is used, the postal information for the orders can be uploaded.



ORDER DETAIL:

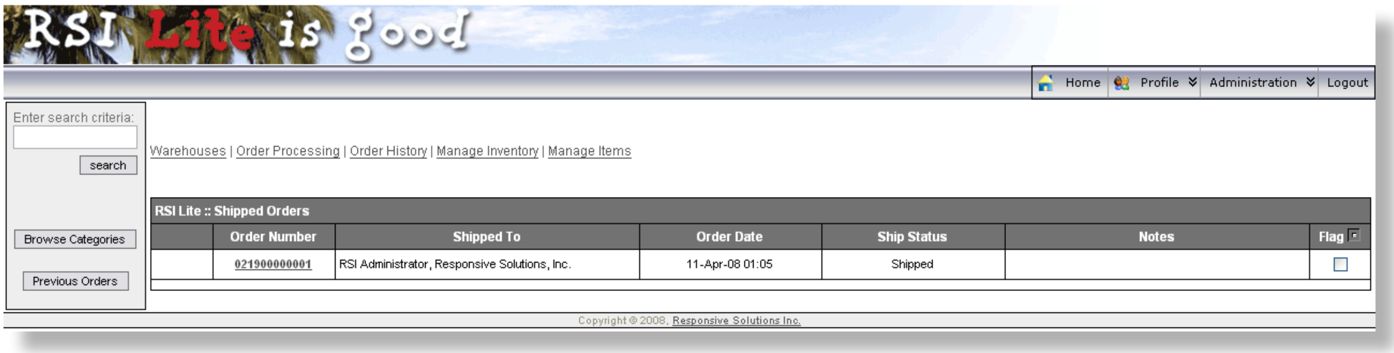
The Order Detail Screen allows the administrator to look at the details of a single order, adjust the shipping selections, adjust the order quantities, line-item ship items, void the order, or mark it as shipped.

The Packing Slip can be printed from this page as well.



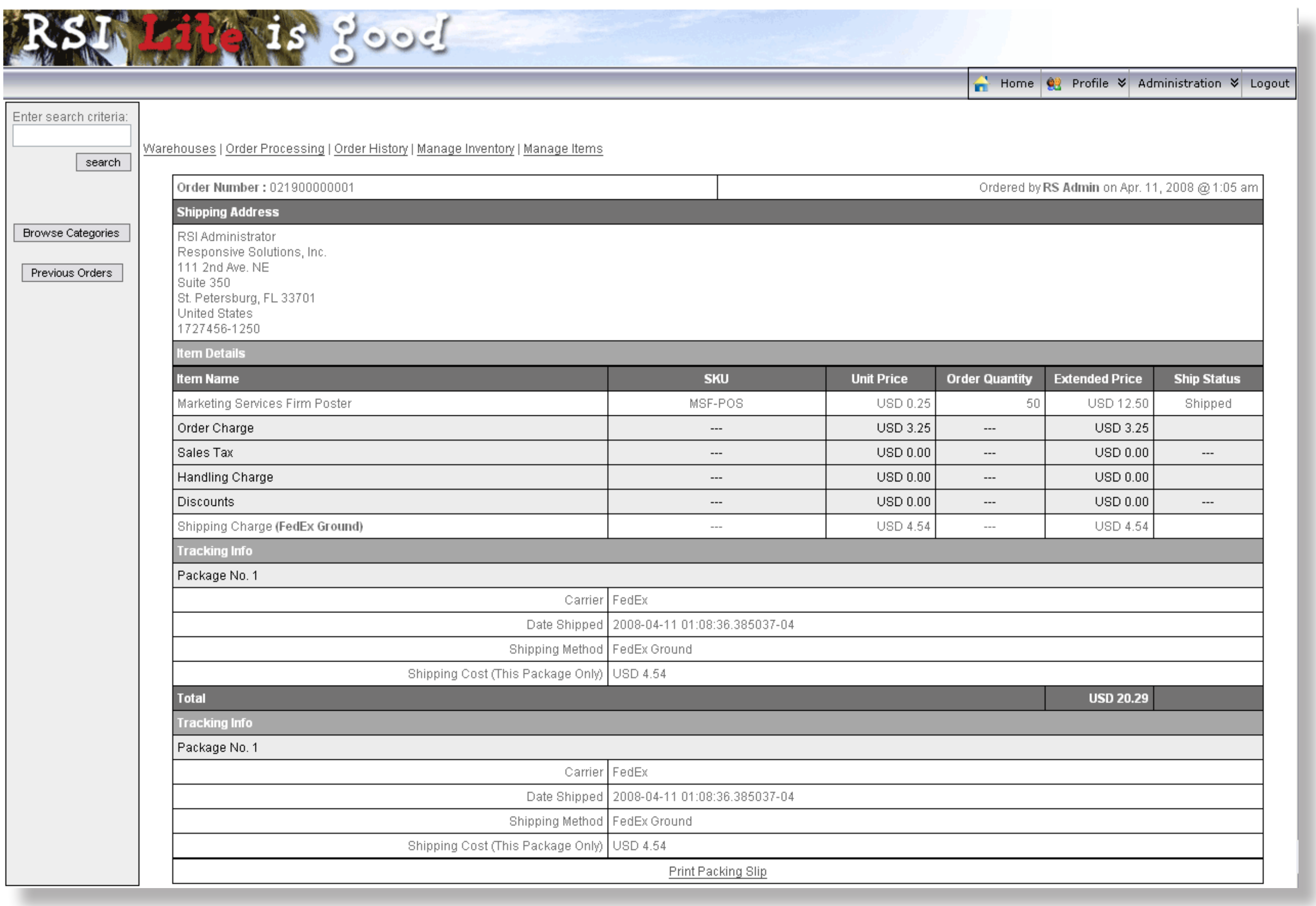
ORDER HISTORY:

The Order History screen allows the Administrator to view all past orders and see the details of each.



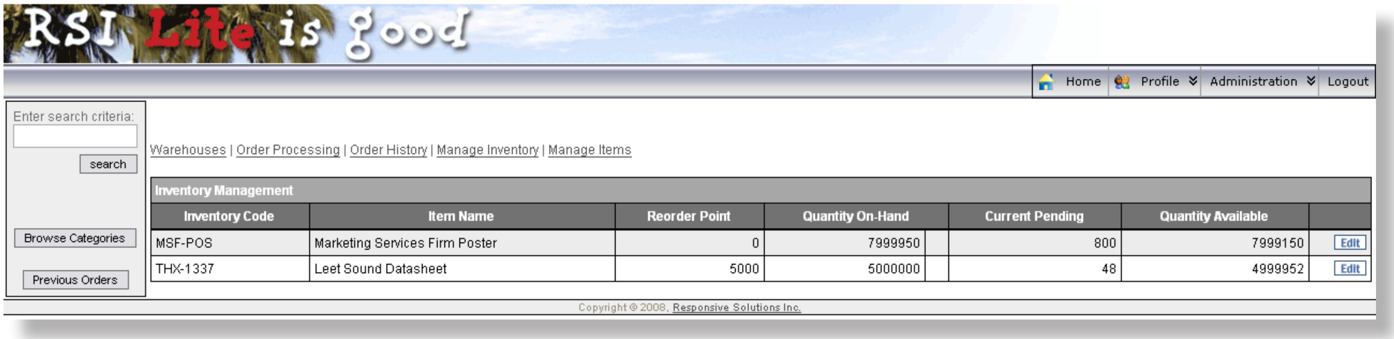
ORDER HISTORY DETAIL:

The Order History Detail screen shows the Administrator the full order detail as well as allowing the packing slip to be printed if needed.



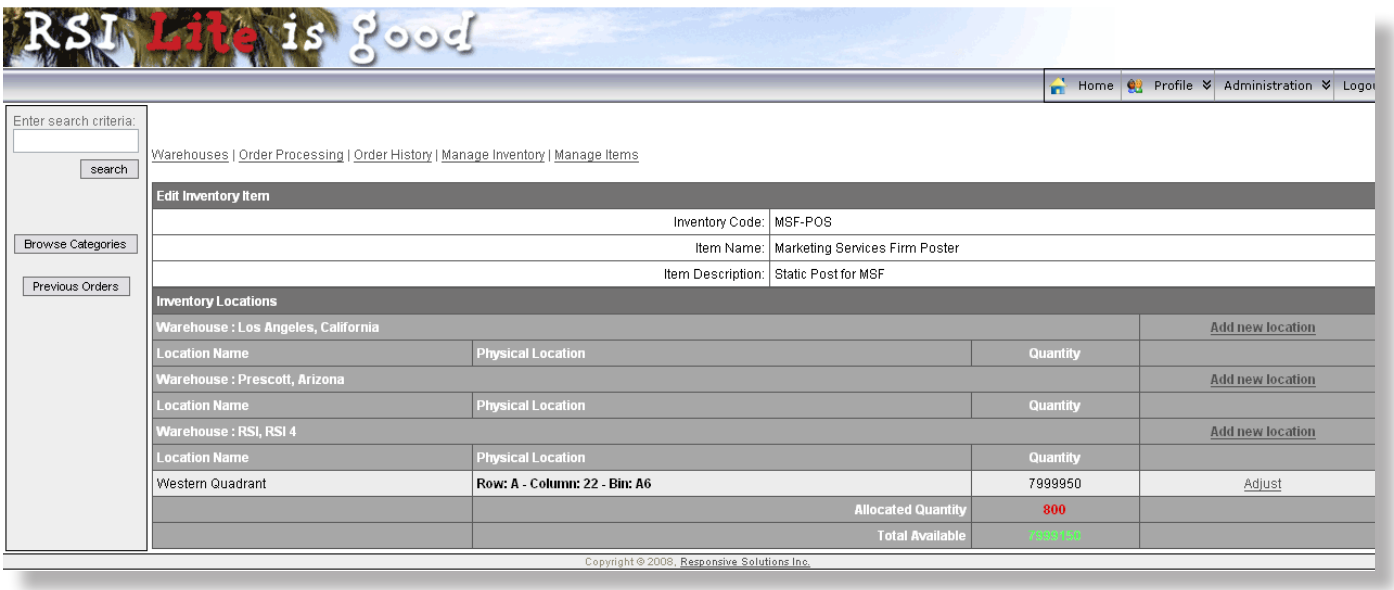
MANAGE INVENTORY:

The Order History screen allows the Administrator to view all inventoried items and their current levels.



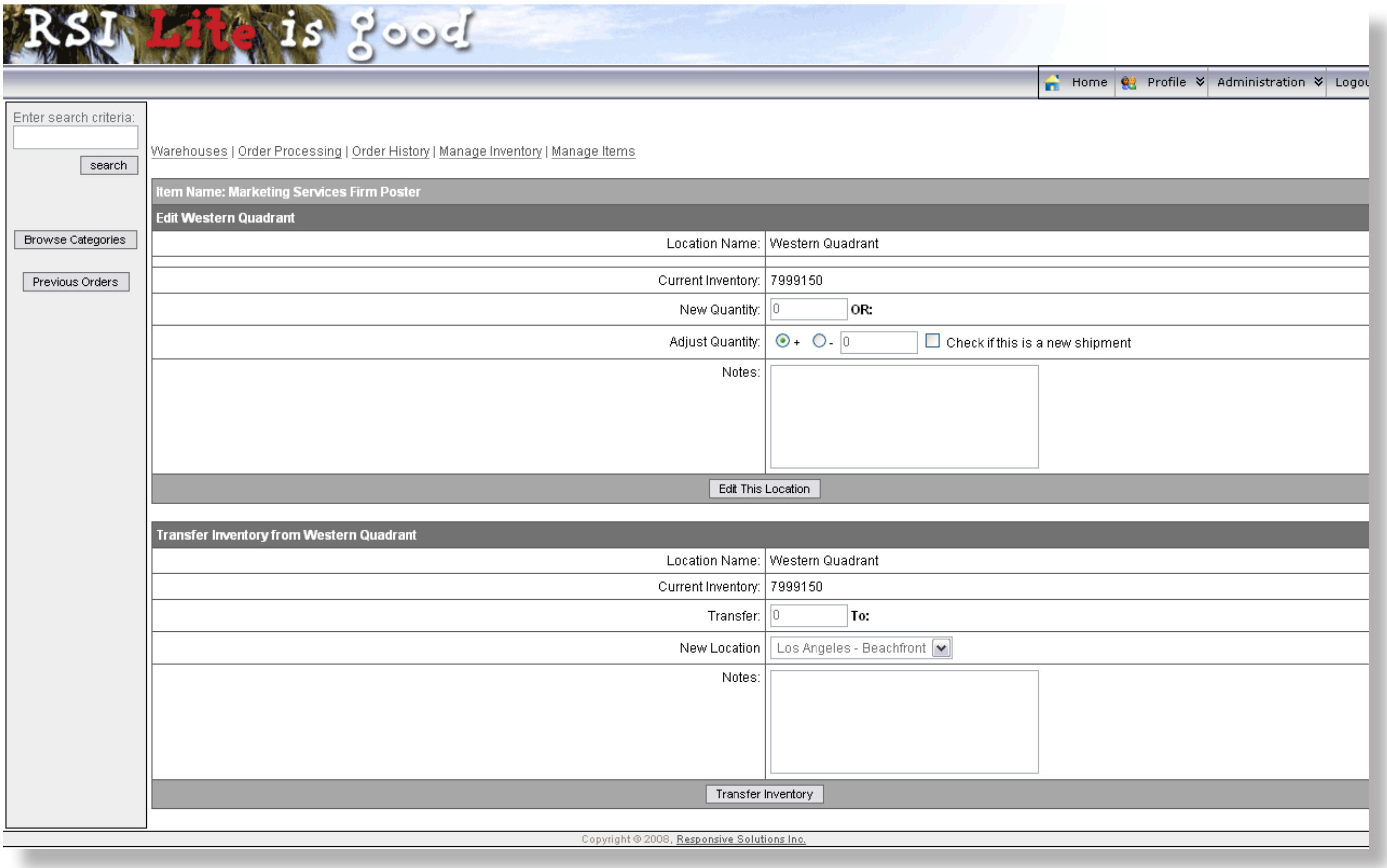
EDIT INVENTORY:

The Edit Inventory Item Screen screen allows the Administrator to add and adjust inventory levels for an item across all warehouse locations.



EDIT INVENTORY:

At the warehouse level, the Edit Inventory Item Screen screen allows the Administrator to adjust and add inventory to the existing location, or transfer inventory between locations and warehouses.

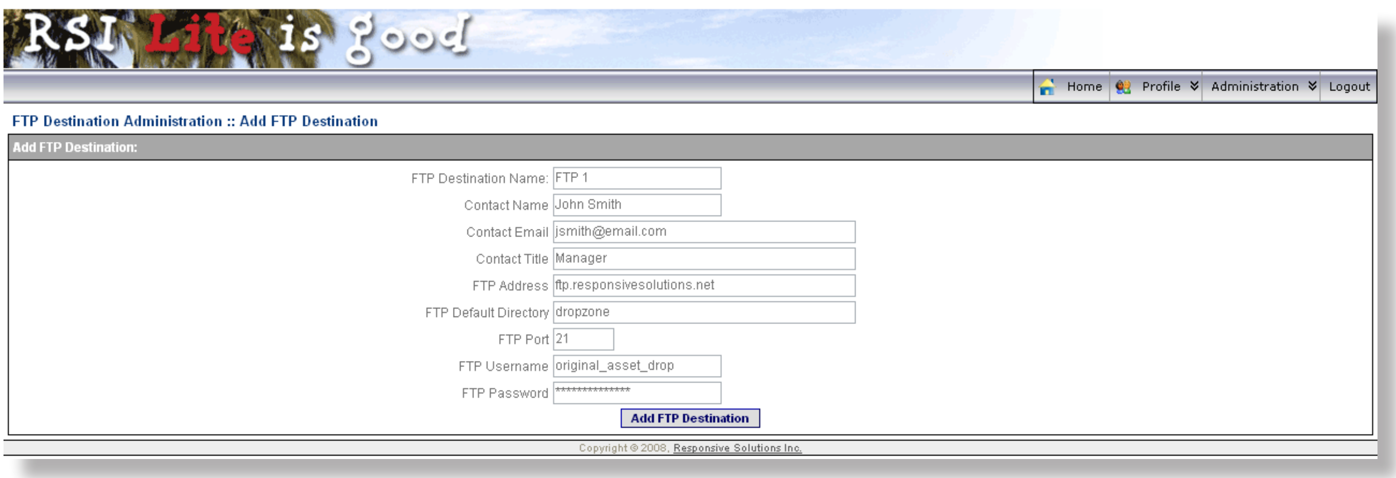


FTP DESTINATIONS:

This area allows the Administrator to add and edit the FTP Destinations for file delivery. As noted in the Item Management section, only JIT and VT items use the FTP delivery method. It is important to note that these FTP Destinations must be created before any JIT or VT items can be created.

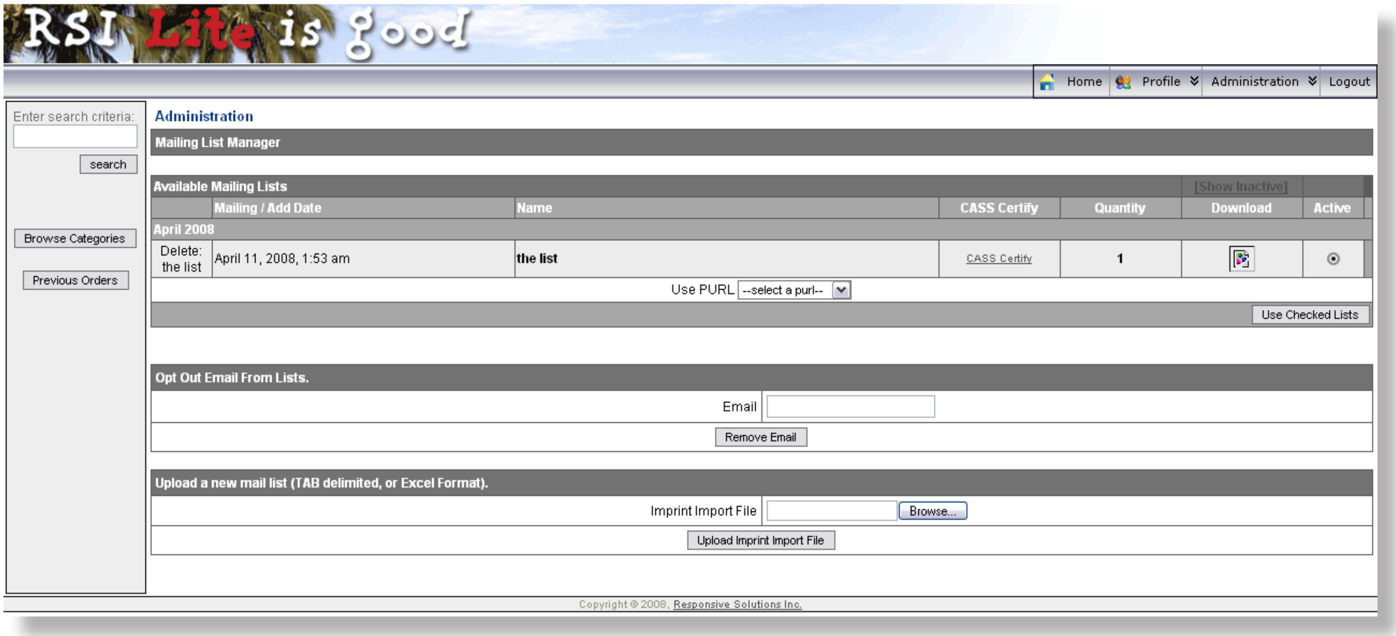
ADD/EDIT FTP DESTINATIONS:

This screen allows the Administrator to create the FTP Destination used for JIT and VT items. The critical information is the FTP address, the FTP Default Directory, the FTP Port (usually 21), and the FTP Username and Password. When all data has been entered, click Add FTP Destination.



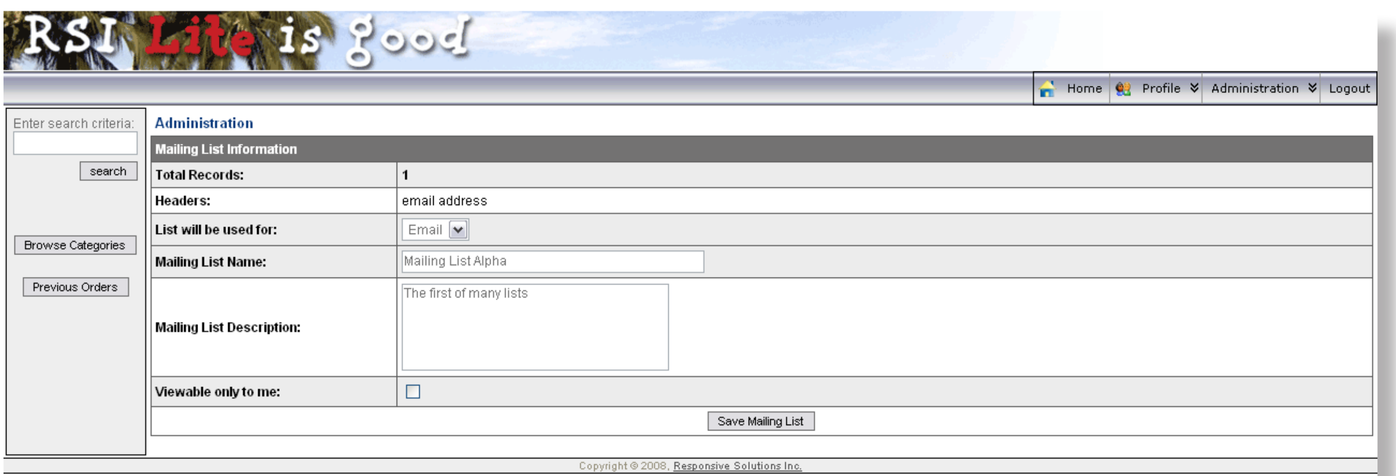
MAILING LISTS:

This area allows the Administrator to upload and manage mailing lists for Variable Data objects. These lists can be used for Email, PURLs, or Variable Data Print items. The option to opt out users is available as well to manually remove email addresses from the system and be sure they are not contacted again.



UPLOADING LISTS:

Whenb mailing lists are uploaded, they can be in Excel spreadsheet or tab delimited format. The file must be closed before it is uploaded. The option to keep the list private is also available.



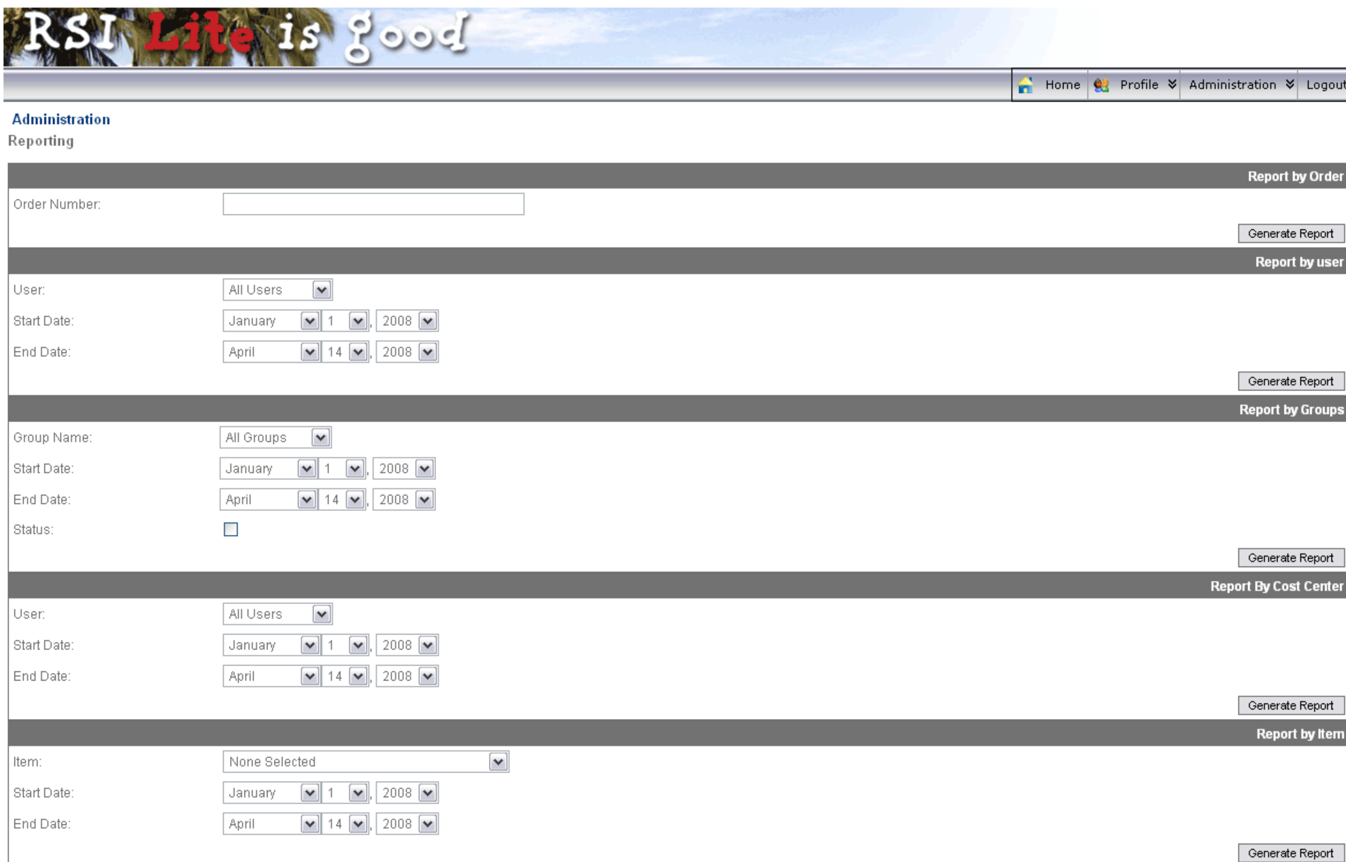
REPORT MANAGEMENT:

Reports are listed based on the system modules that are being used.

From this screen the administrator can select the start date and end date an other parameters for a report. Once you have selected the desired reporting values, click the **generate report** button.

Some Examples of Report Types:
- **Report By User –** Displays orders for individual users for a given time period.
- **Report By Item –** Displays orders that contain the selected item.
- **Report By Groups –** Displays all orders for selected group for a given time period..
- **Inventory Report –** Displays current item quantities. Fulfillment module required for this report.
- **Shipped Orders Report –** Displays orders based on when they were shipped, outlines items contained within the order Fulfillment module required for this report.

Reports may vary depending on modules chosen and data required. Customized reports are available.

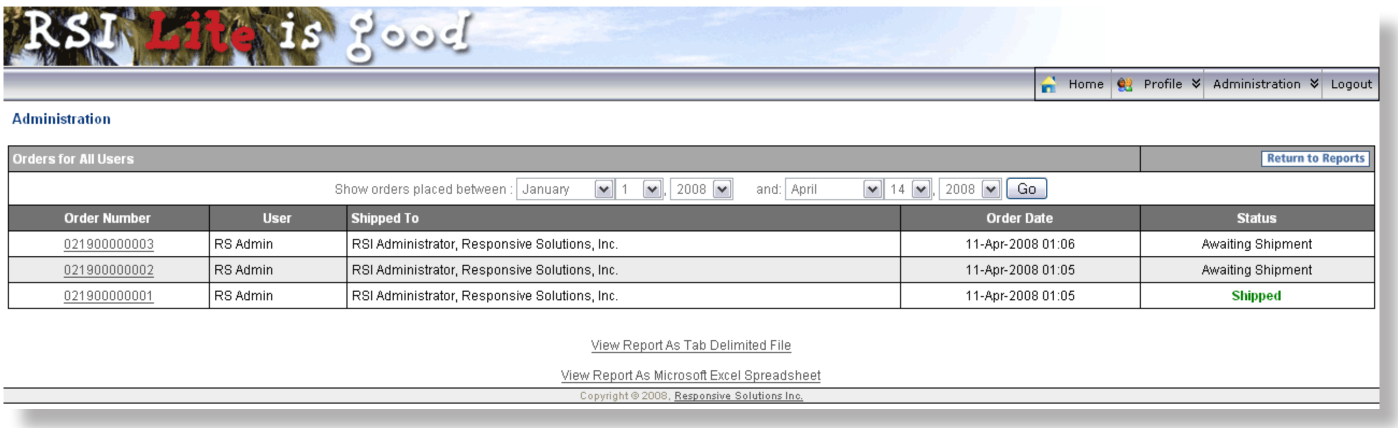


SAMPLE REPORT:

Reports are displayed with the option look at line items, download as tab delimited files, or download as Microsoft Excel spreadsheets.

This example is Report by User. It shows the Order Number, the User, who the order was shipped to, the Order Date, and the current status.

Note: Reports display different data based on the selected report and parameters.


RSI Lite is good

Home | Profile | Administration | Logout

Administration

Orders for All Users — Return to Reports

Show orders placed between : January 1, 2008 and: April 14, 2008 Go

Order Number	User	Shipped To	Order Date	Status
021900000003	RS Admin	RSI Administrator, Responsive Solutions, Inc.	11-Apr-2008 01:06	Awaiting Shipment
021900000002	RS Admin	RSI Administrator, Responsive Solutions, Inc.	11-Apr-2008 01:05	Awaiting Shipment
021900000001	RS Admin	RSI Administrator, Responsive Solutions, Inc.	11-Apr-2008 01:05	Shipped

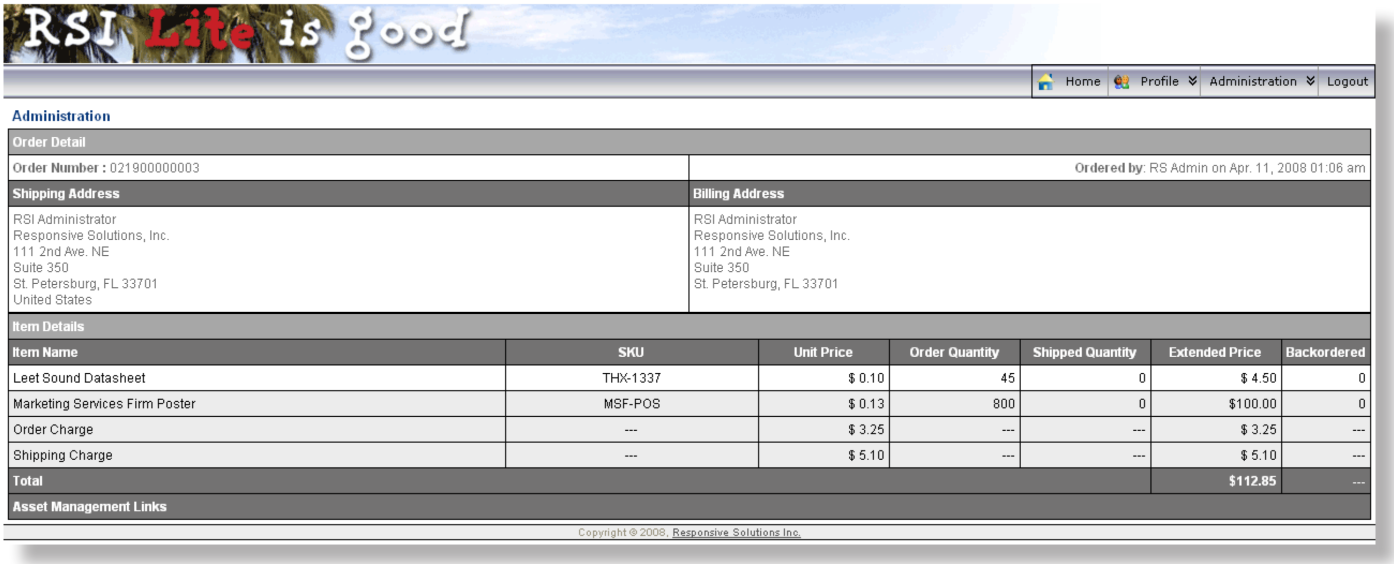
View Report As Tab Delimited File

View Report As Microsoft Excel Spreadsheet

Copyright © 2008, Responsive Solutions Inc.

ORDER DETAIL:

The individual order detail displays all of the information about an order, including shipping, pricing, and the items ordered..



Item Name	SKU	Unit Price	Order Quantity	Shipped Quantity	Extended Price	Backordered
Leet Sound Datasheet	THX-1337	$ 0.10	45	0	$ 4.50	0
Marketing Services Firm Poster	MSF-POS	$ 0.13	800	0	$100.00	0
Order Charge	---	$ 3.25	---	---	$ 3.25	---
Shipping Charge	---	$ 5.10	---	---	$ 5.10	---
Total					$112.85	---

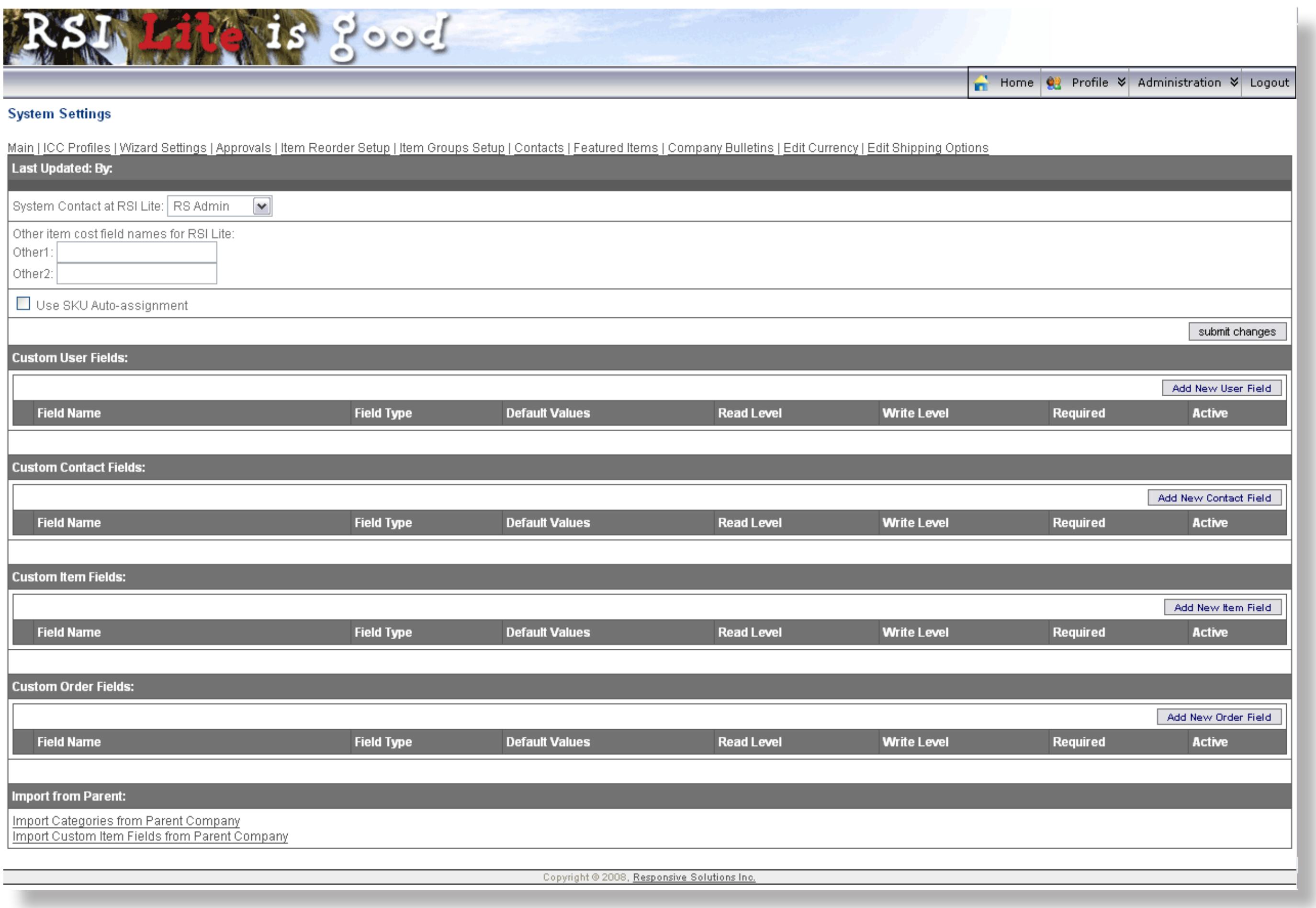
SYSTEM INFO:

From this screen the administrator can select the contact person for the system and add custom accounting fields.

Editing system contact and custom accounting fields
Using the pull down menu select the user that should be contacted if anything needs to be reported to about the system.
There are two custom accounting fields that can be modified for the system, leave these blank if there are no custom accounting fields. To edit these items click the **submit changes** button.

Custom Fields:
Custom user and item fields are listed for the system. Displayed is the **Edit** button, Field Name, Field Type, Default Value, Read Level, Write Level, Required and the **activate / deactivate** button.

Editing Custom fields
To edit a custom field click the **Edit** button next to the Field Name. To add a new custom field click the **Add New Field** button.



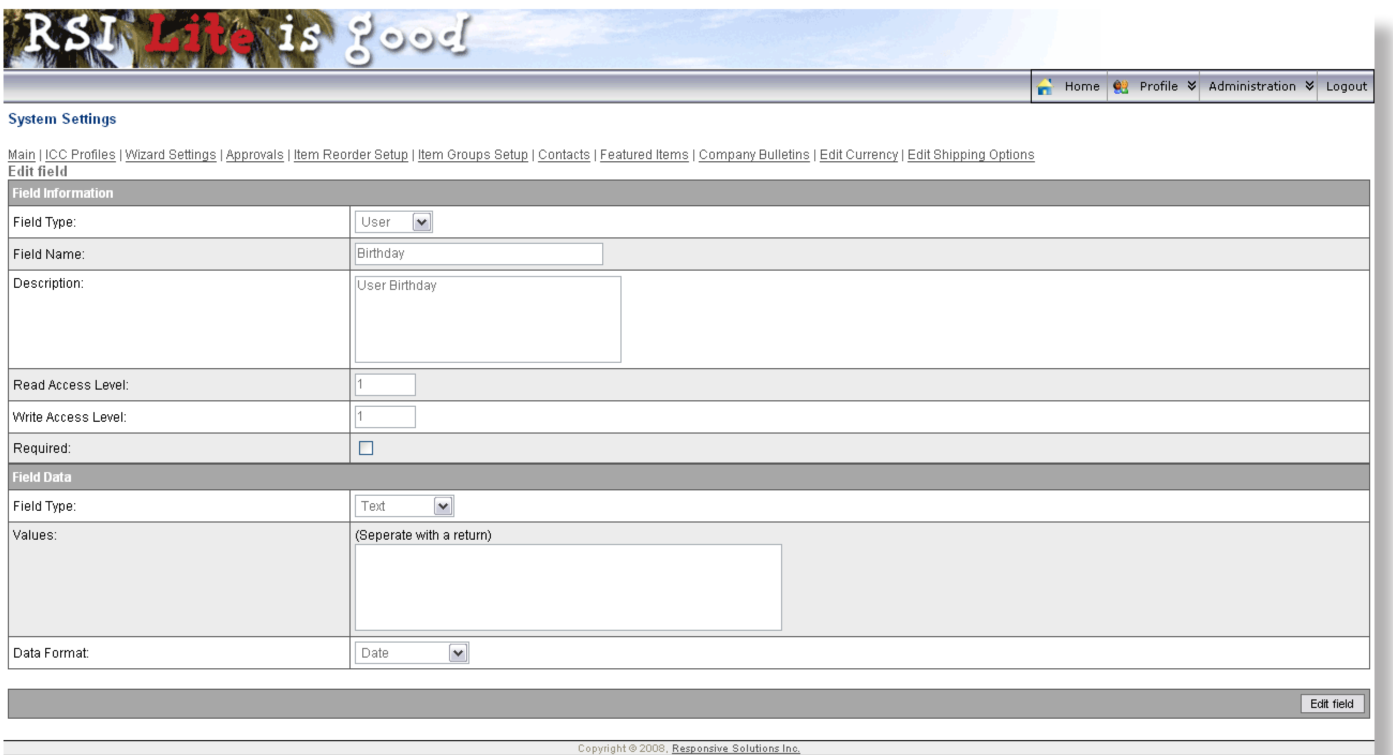
EDIT CUSTOM FIELDS:

The Edit Custom Fields Screen allows the administrator to add / edit custom user and item fields for the system. Adding a custom field is identical to editing a field, except that the values are blank.

Editing Custom Field Information

- Select the Field Type for the custom field, user or item.
- The field name will be used to identify the field, enter the field name here.
- The Description is a description of the field, enter the field description here.
- **Read Access Level** – The Read Access Level sets the minimum security level for a user to see this field.
- **Write Access Level** – The Write Access Level sets the minimum security level for a user to edit this field.
- **Required** – Checking this field requires the user to enter or select a value for this field.

- **Field Type** – The Field Type selector determines what type of data the field uses. Three types of data are available:
    - Text – Used to enter text into the system
    - Single Select – Used when a user should only select one option from a list of values
    - Multiple Select – Used when a user can select many options from a list of values
- **Values** – The Values field determines the default data for the field. To enter select values enter a line of text and hit return.



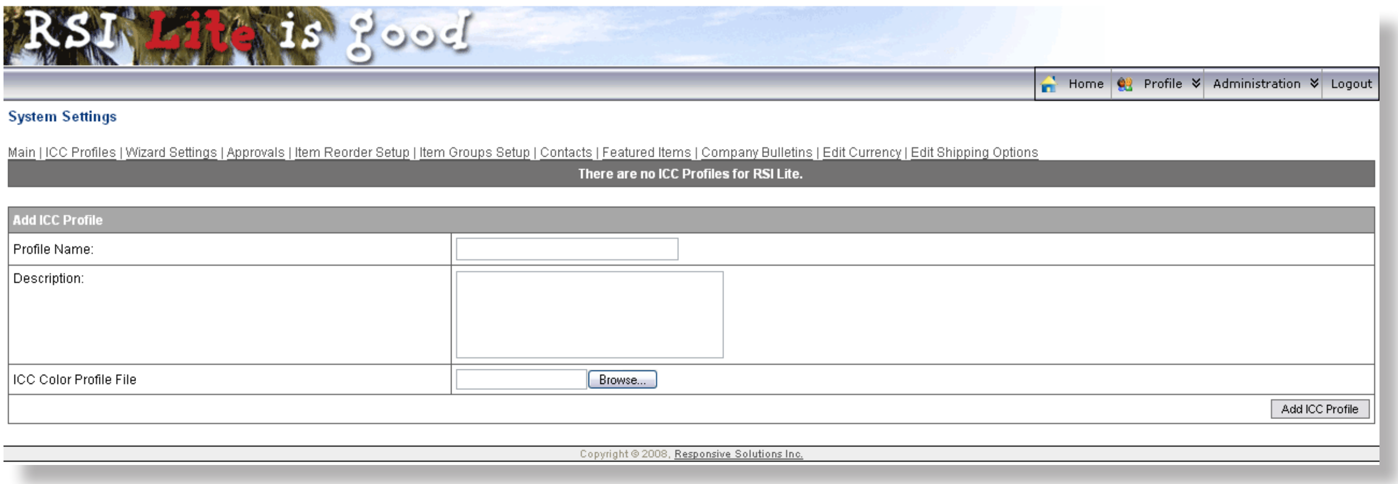
ICC PROFILES:

ICC Profiles for the system are listed alphabetically. Clicking the Edit button edits the profile, clicking the Delete button removes the ICC Profile. Adding a ICC Profile is identical to editing a profile, except that the values are blank.

Editing ICC Profile

- **Profile Name** – Used to display the name of the profile in the pull down menus and reporting.
- **Description** – Used to describe the ICC Profile.
- **ICC Profile File** – Click the **Browse** button to find and upload the desired ICC Profile.

Click the **Add ICC Profile** button to add / edit the profile.



EDIT CONVERSION WIZARD SETTINGS:

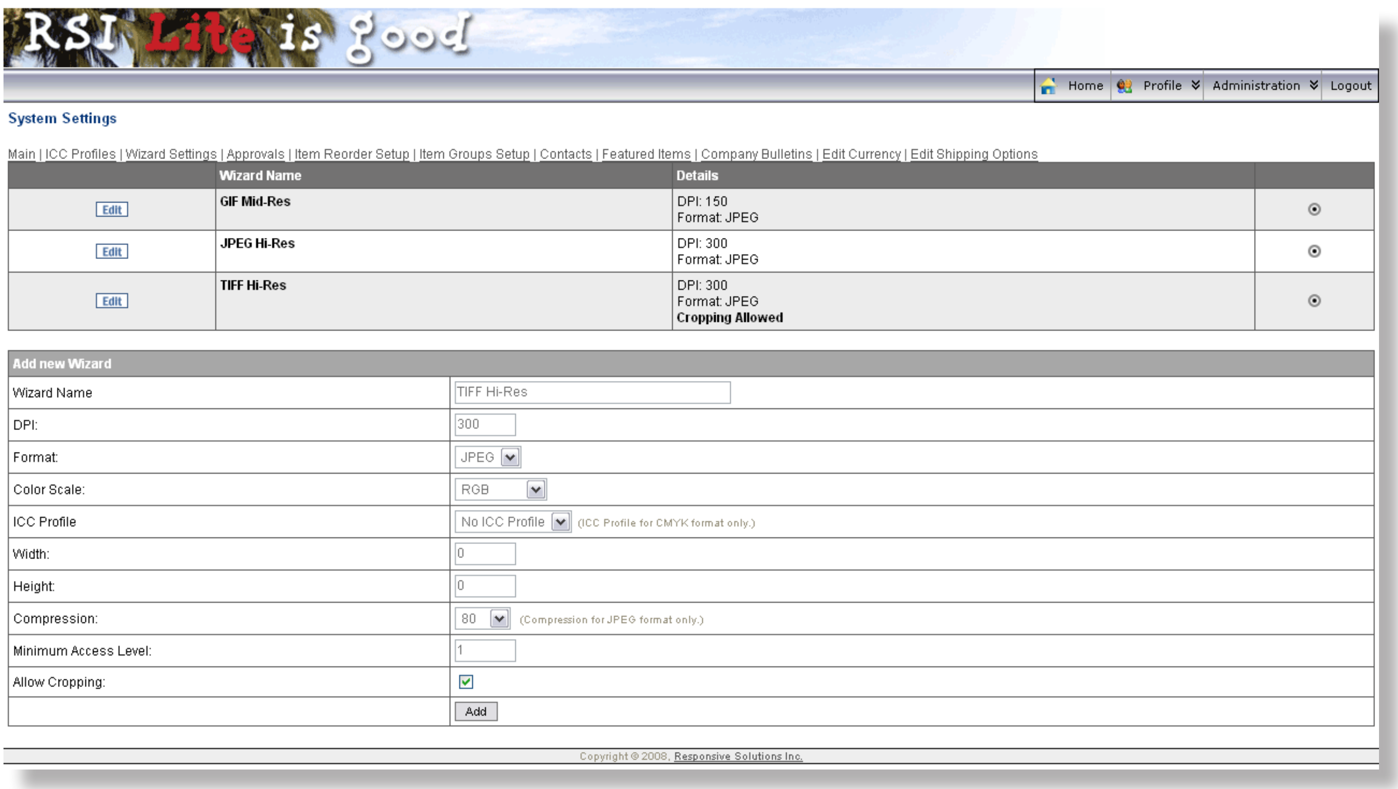
The Edit Conversion Settings Screen allows the administrator to add / edit asset conversion settings for the system. Adding a conversion setting is identical to editing a setting, except that the values are blank.

Conversion settings are listed alphabetically, and **Edit** button, Wizard Name and **active / de-active** button are listed.

Editing Conversion Wizard Settings

- **Wizard Name** – The display name for the wiazrd.
- **DPI** – The desired Dots Per Inch for the image, use only numbers in this field.
- **Format** – The image format for the output image, Jpeg, Gif or Tiff are available.
- **Color Scale** – The color scale for the output image, Gray scale, RGB or CMYK are available.
- **ICC Profile** – If an ICC Profile will be applied, select the profile name from the select menu.
- **Width** – The desired width for the output image.
- **Height** – The desired height for the output image.
- **Compression**– The desired compression for the output image. **Note:** compression only applies to Jpeg images.
- **Minimum Access Level** – The designated level required for conversion.
- **Allow Cropping** – This activates/deactivates the cropping option for images..

Click the **Add** button to add this conversion wizard



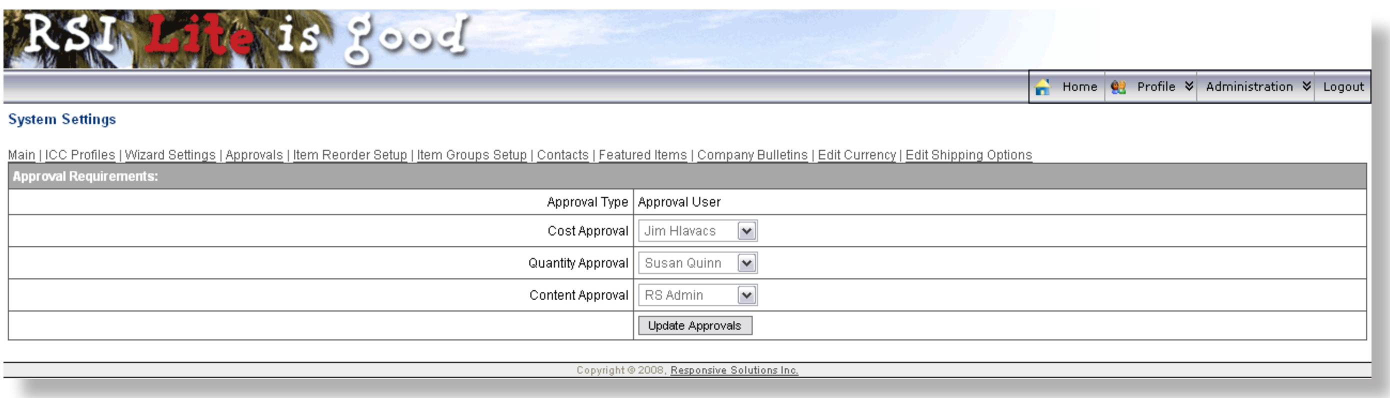
EDIT SYSTEM APPROVAL USERS:

The Edit System Approvals Screen allows the administrator to assign approval users for the system.

Editing System Approval Users

- **Cost Approval** – Choose the desired user from the selection box that will receive notifications and approve orders that are needing approval for cost.
- **Quantity Approval**– Choose the desired user from the selection box that will receive notifications and approve orders that are needing approval for quantity.
- **Content Approval** – Choose the desired user from the selection box that will receive notifications and approve orders that are needing approval for content.

Click the **Update Approvals** button to modify the approval users.



EDIT SYSTEM NOTIFICATIONS:

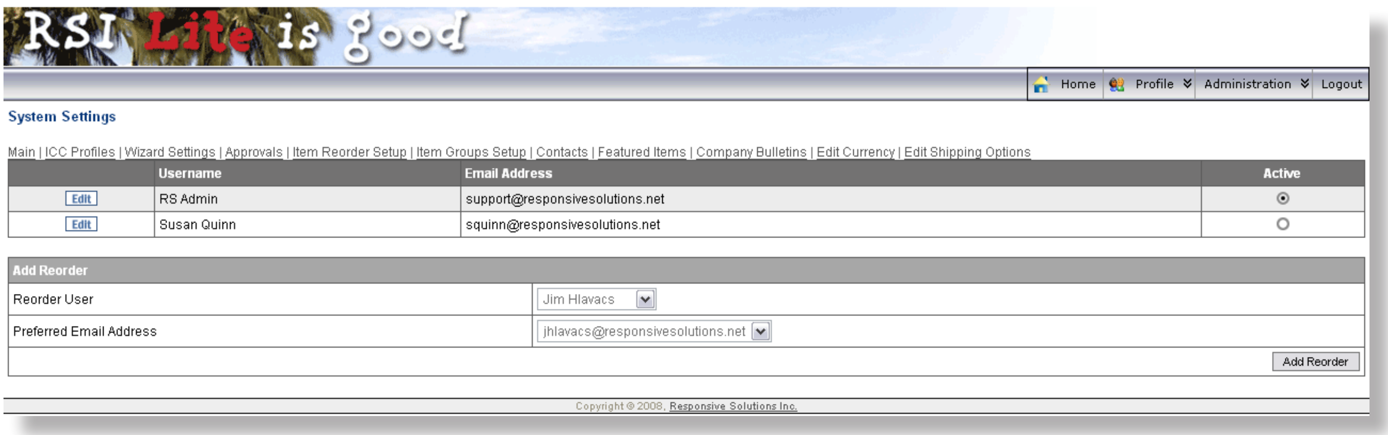
The Edit System Reorder Notifications Screen allows the administrator to assign users who will receive reorder notifications when items are running low. Reorder users are listed alphabetically.

Click the **Edit** button to modify the email address for the user, click the **activate / deactivate** button to remove the user from the reorder users.

Editing System Reorder Users

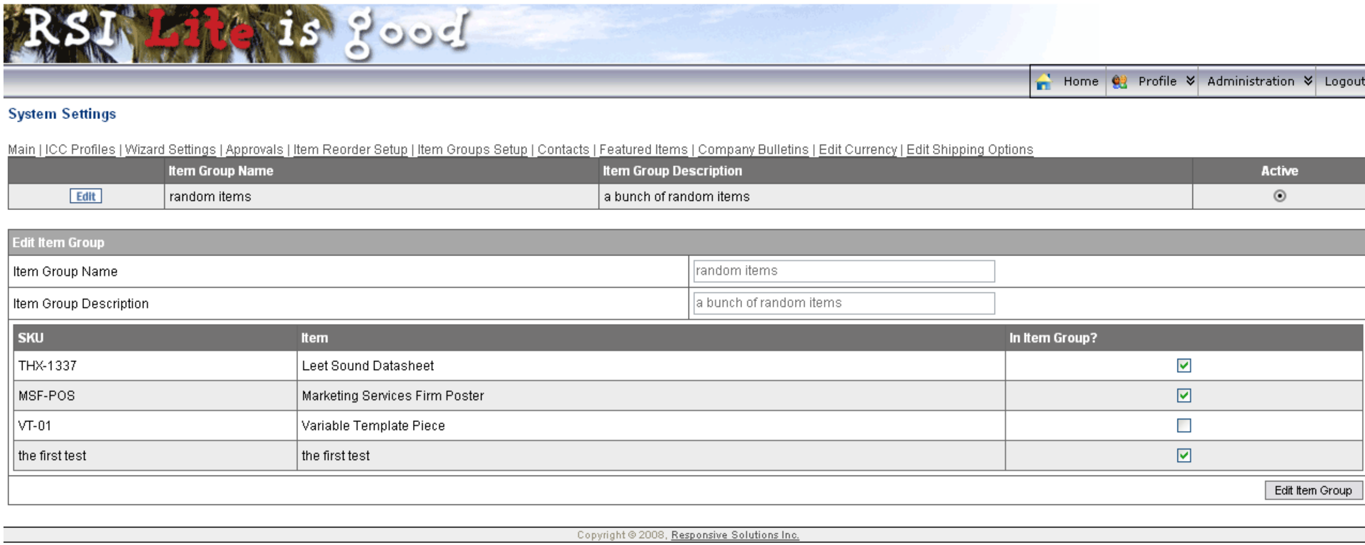
- **Reorder User** – Choose the desired user from the selection box that will receive notifications when a reorder notification is sent.
- **Preferred Email Address** – Choose the desired email address for the user to receive notifications

Click the **Add Reorder** button to modify the reorder notification users.



ITEM GROUPS SETUP:

The Item Groups Setup allows the Administrator to group items together for reporting purposes that might not other be grouped.



EDIT SYSTEM CONTACTS:

Contacts are listed alphabetically by name. By clicking on the letters at the top of the page, contacts whose name begin with the chosen letter are displayed. A search box is also available for finding a specific contact.

From this screen the administrator can add, edit, activate, or inactivate contacts.

Adding Contact:
Clicking on the **Add New Contact** button allows the administrator to add a contact to the system.

Editing:
Clicking on the **Edit** button allows the administrator to edit the selected contact information.

Activating / De-activating contacts
Clicking the Active button disables the contact in the system, this contact can no longer be used for shipping, although history for the deactivated contact is retained. Remember: a hollow button denotes in-active, a dot represents active.

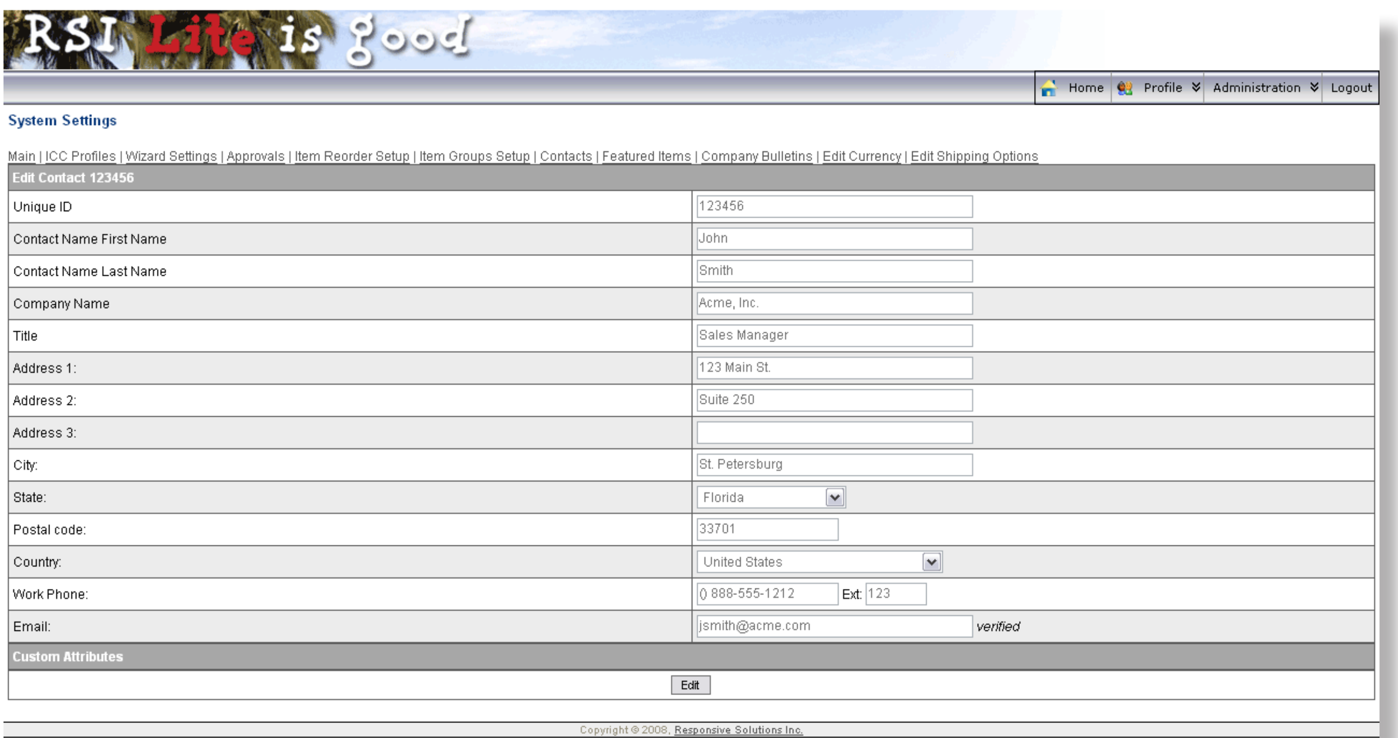
EDIT SYSTEM CONTACT:

The Edit System Contact Screen allows the administrator to edit the contact.

Contact Settings

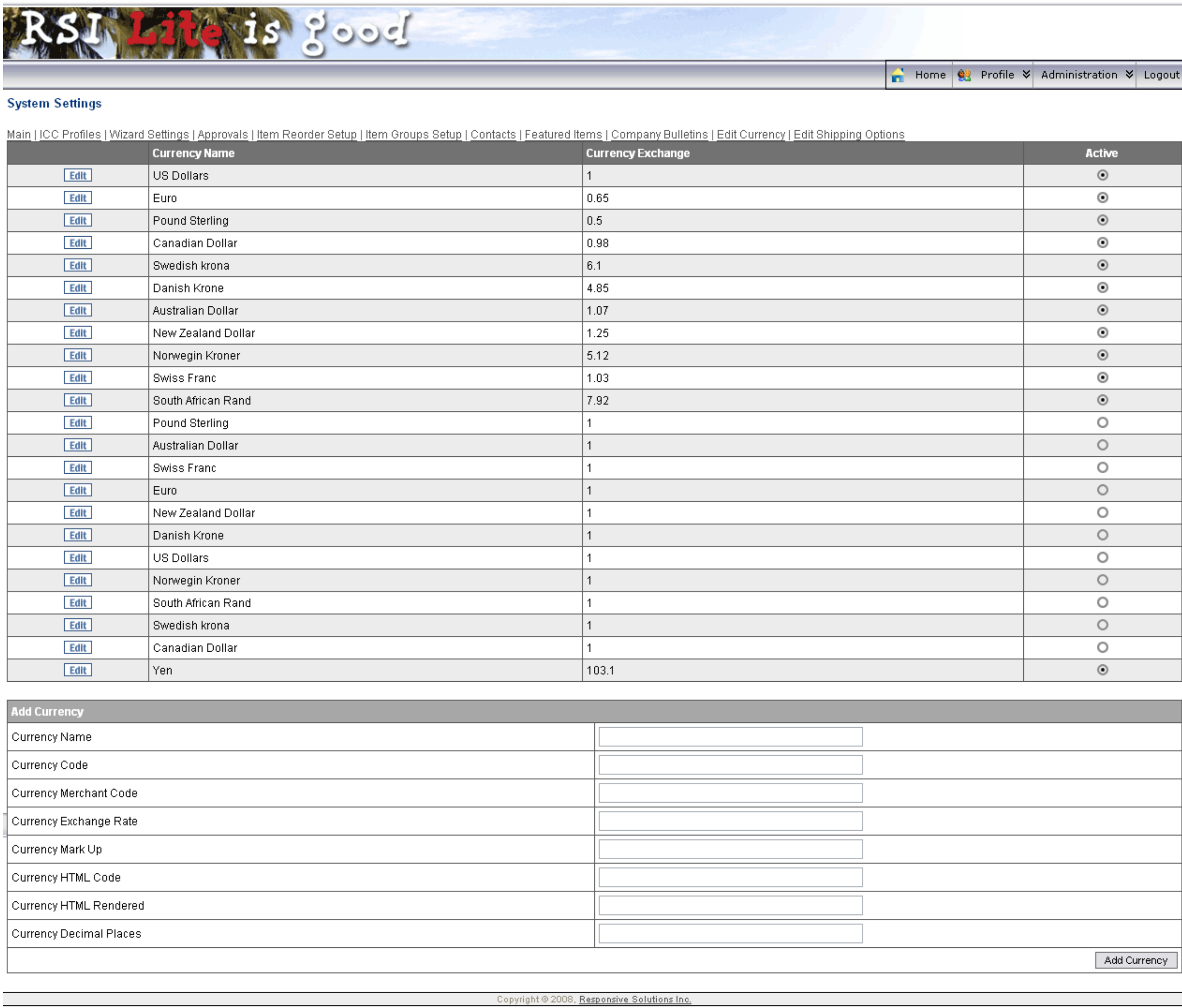
- **Unique ID** – The unique ID for the contact.
- **Contact Name First Name** – Contact First Name.
- **Contact Name Last Name** – Contact Last Name.
- **Company Name**– Contact Company Name.
- **Title** – Contact Title.
- **Address 1** – Contact Address 1.
- **Address 2** – Contact Address 2.
- **Address 3** – Contact Address 3.
- **City** – Contact City.
- **State** – Contact State.
- **Postal Code** – Contact Postal Code.
- **Country** – Contact Country.
- **Work Phone** – Contact Work Phone.
- **Email Address** – Contact Email Address.

Click the **Edit** button to modify this contact



EDIT CURRENCIES:

If currencies are being used, this screen is where they can be adjusted and activated/inactivated for conversion purposes.



	Currency Name	Currency Exchange	Active
Edit	US Dollars	1	◉
Edit	Euro	0.65	◉
Edit	Pound Sterling	0.5	◉
Edit	Canadian Dollar	0.98	◉
Edit	Swedish krona	6.1	◉
Edit	Danish Krone	4.85	◉
Edit	Australian Dollar	1.07	◉
Edit	New Zealand Dollar	1.25	◉
Edit	Norwegin Kroner	5.12	◉
Edit	Swiss Franc	1.03	◉
Edit	South African Rand	7.92	◉
Edit	Pound Sterling	1	○
Edit	Australian Dollar	1	○
Edit	Swiss Franc	1	○
Edit	Euro	1	○
Edit	New Zealand Dollar	1	○
Edit	Danish Krone	1	○
Edit	US Dollars	1	○
Edit	Norwegin Kroner	1	○
Edit	South African Rand	1	○
Edit	Swedish krona	1	○
Edit	Canadian Dollar	1	○
Edit	Yen	103.1	◉

Add Currency	
Currency Name	
Currency Code	
Currency Merchant Code	
Currency Exchange Rate	
Currency Mark Up	
Currency HTML Code	
Currency HTML Rendered	
Currency Decimal Places	
	Add Currency

EDIT SHIPPING OPTIONS:

Shipping options are configured from this screen. An important thing to note is that for real-time shipping quotes from UPS and FedEx, items must have a weight associated with them for the calculation to occur, otherwise, the option will not appear at checkout.

Each shipping option must have a display name, located on the far left column. The selection can also be designated as requiring approval and whether or not to display the rates. Options can be activated and deactivated. The Display order dictates the way the list of options are displayed, from lowest to highest.

The options can be selected from the dropdown menu in the center column. In the case of UPS and FedEx, the secondary dropdown menu will be populated with all of the available options.

The right column allows the administrator to mark up or down the option cost, as well as add an initial default cost, and an incremental cost. Percentage Mark-up/down is based on 100% of the returned cost, (i.e. a 20% markup would be listed as 120, a 25% markdown would be 75).

When shipping options are added or edited, implement them by clicking Submit Changes.